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A CASE STUDY OF ORGANIZING TECHNIQUES OF FLORIDA PUBLIC EDUCATION UNIONS AFTER THE PASSAGE OF HOUSE BILL 7055

By

CHERYL PLASTER VINSON

A doctoral dissertation submitted to the

College of Education

in partial fulfillment of the requirements

for the degree Doctor of Education

in Organizational Leadership

Southeastern University

July 2021

A CASE STUDY OF ORGANIZING TECHNIQUES

OF FLORIDA PUBLIC EDUCATION UNIONS

AFTER THE PASSAGE OF HOUSE BILL 7055

By

CHERYL PLASTER VINSON

Dissertation Approved:

Janet Deck, EdD, Dissertation Chair

Steve Henderson, EdD, Committee Member

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James Shuls, PhD Dean, College of Education

DEDICATION

"Accomplishments will be a journey, not a destination."

--Dwight D. Eisenhower.

"Don't Panic." --Douglas Adams

Seven years. Seven long years of laughter, tears, Cohort A summer intensives, late-night studying, gallons of coffee, endless hours at Starbucks and Panera, two hurricanes, and an international pandemic. I am not bold enough to say that this journey was my own; every step of the way there were numerous supporters.

To my Fabulous Five—Kathi, Lori, Davina, Renee, and Jenna- who have stood by me for 32 years and supported me in every adventure.

To the following friends for their reassurance along the way—Angela, Brenda, Christie, Griena, Janet, Joan, Joel, Joshua, Mark, Monica, Mike, and Steve.

To my TROY family for igniting and encouraging my passion for leadership: Dr. Emma Norris, Dr. Norma Mitchell, Mr. Ed Siler, Mrs. Faith Byrd, and Dr. Jack Hawkins, Jr.

To my union family—this story belongs to you as well—and it would not be possible without you.

And most of all, to my family: to Uncle Rene & Janet, Aunt Carol, and the Tallahassee Plasters for long-distance encouragement; to my sister Heather, my daughter Melody, and to my parents Charles and Barbara Plaster. This road has not been easy, but we kept traveling. I could not have done this without you. This degree is as much yours for your love and support. I love you, and yes, Melody, I am done.

ACKNOWLEDGMENTS

Luke 6:40 The student is not above their teacher, but everyone who is fully trained will be like their teacher.

This dissertation would not be possible without the following individuals. I'm extremely grateful to Dr. Steve Henderson for serving as my advisor over the years, starting my dissertation journey, and our many spirited discussions about life, leadership, and unions. I am indebted to Dr. James Anderson for teaching me everything I never knew about methodology and serving as my methodologist. I would like to thank Dr. Susan Stanley for serving as my professional editor as I prepared the manuscript for the final dissertation stages. I'm deeply indebted to Lori Northrup, Associate Dean at the Samford University Library, for her assistance in acquiring journals The completion of this dissertation would not have been possible without the patience, direction, encouragement, and guidance of Dr. Janet Deck as we navigated this dissertation together. There are not enough words for your support and prayers.

ABSTRACT

The purpose of this qualitative study was to explore how public education unions are maintaining or increasing their membership density to meet the requirements of Florida House Bill 7055. CS/House Bill 7055 was the legislative act passed in 2018 that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent. Traditional labor union studies typically reflect labor union decline through the decertification process started by the general membership due to dissatisfaction. This case study examined the impact of a legislative act that modified density requirements for public education instructional unions only in the state of Florida. Organizational survival theories of population ecology and resource dependency theory framed the research. Results from the interviews provided insight into the perceptions of teacher union leaders who shared their experiences since the bill went into effect. Leadership strategies, decision-making, and control of resources contributed significantly to the organizing techniques, as leaders led their union families through uncharted territory.

Keywords: teacher unions, unions, organizing strategies, leadership, resource dependency theory, population ecology

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

I. INTRODUCTION

The purpose of this qualitative case study was to explore how public education unions were maintaining or increasing their membership density to meet the requirements of Florida House Bill 7055. Flanders (1970) defined collective bargaining as the process used by trade unions to maintain or improve the working conditions of their members. Collective bargaining for public employees was legislated at state levels through a state commission, in contrast to private sectors, which are regulated by the National Labor Relations Act, also known as the Wagner Act of 1935.

The history of collective bargaining in Florida is complicated. Before the 1960s, limited collective bargaining occurred due to the substantial influence businesses had on the state legislature. The Union Regulation Act of 1943 established regulations in Florida that allowed collective bargaining in the private sector and prevented the formation of public negotiations in the public sector. Upon the bill's ratification, Florida became the first right-to-work state in the country (Miller & Canak, 1991).

In 1946, the Florida Supreme Court ruled that Florida laws disallowed public employees, or their organizations, any right to collectively bargain, picket, or strike against the government, be it at the state, county, or city level. In 1959, Florida's legislature passed another law that prohibited the employment of any person who had participated in or advocated participation in, a

strike (Public Employee Relations Commission [PERC], 2016). In 1962, the "right-to-work" section of the Florida Constitution was revised to allow non-union employees to join, or refrain from joining, an employee organization without employer reprisal. In 1968, the legislature revised the "right-to-work" section of the Florida Constitution to prohibit public employees from striking (PERC, 2016). Almost two decades passed before the state established an agency that objectively monitored the unionization process in Florida (McHugh, 1978).

The Florida Public Employee Relations Commission was the government entity that oversaw the collective bargaining process for all public sector unions in Florida. This commission was responsible for determining if unions met the membership requirements to maintain certification as the bargaining agents. Various labor challenges had taken place in the state regarding public employees, especially in the public education sector. The Florida Legislature, in 2017 and 2018, attempted to pass bills regarding the decertification of public sector unions. Representatives Bileca and Diaz sponsored House Bill 7055 (CS/House Bill 7055). The bill, filed on January 25, 2018, focused on appropriations for education. On February 5, 2018, a committee inserted an amendment requiring each public education union to maintain a minimum union membership of 50% of eligible district employees to remain as the certified bargaining unit (House Bill 7055, 2018-6. 2018).

Background of the Study

In 1968, the people of Florida approved a revised constitution that allowed collective bargaining for public employees. The 1969 court case *Dade County Classroom Teachers Association v. Ryan* defined the need for fair implementation of the collective bargaining process within the state (Miller & Canak, 1991). After two legislatures failed to establish this process, the Florida Supreme Court justices appointed the Supreme Court PERC, and in 1974, the

commission presented the guidelines to the court (McHugh, 1978). The Public Employees Relations Act (PERA) subsequently became law in 1974. The PERA distinctly defined the organizational rights of Florida's public sector workers, such as police officers, firefighters, nurses, and teachers.

The standard for establishing an organization's right to certify as the bargaining unit was based on a required membership percentage. Florida's percentage requirement, established in the 1977 court case *School Bd v. Florida Public Relations Committee*, stated that an employee organization must show at least 30% representation in a proposed unit to file for certification as the collective bargaining unit (Waldby, 1977). The 2017 proposed bills stated the new density requirement. (House Bill 11, 2017).

Restricting collective bargaining was not a new phenomenon, as regulation and enforcement of collective bargaining occurred under state law (Dunderdale, 2018). The first attempt at changing membership density requirements for unions occurred in 2017. State Representative Plakon filed House Bill 11, and State Senator Baxley filed the companion bill, SB 1292. These two bills proposed that organizations registered with PERC must provide the current number of employees in a bargaining unit and the current number of dues-paying members versus non-members (House Bill 11, 2017). Refusal to provide this information were grounds for revoking certification. The bills added the following requirement:

> An employee organization that has been certified as the bargaining agent for a unit whose dues-paying membership is less than 50 percent of the employees eligible for representation in that unit must petition the commission pursuant to subsections (2) and (3) for recertification as the exclusive representative of all

employees in the unit within one month after the date on which the organization applies renewal of registration pursuant to s. 447.305(2) (House Bill 11, 2017).

These requirements were for all public unions, except organizations that represented law enforcement, correctional officers, and firefighters. House Bill 11 successfully passed the Florida House, but its companion bill died in committee. The 2018 legislative session resurrected similar language in CS/House Bill 7055, with two significant differences. The first difference was that the wording was inserted into an omnibus education bill and never read in committees. Second, only public education instructional unions were required to meet the 50% membership density requirement. CS/House Bill 7055 specifically identified the new required density for public educational instructional personnel only (House Bill 7055, 2018-6. 2018). The bill passed, was signed into law, and went into effect on July 1, 2018.

Conceptual Framework

The conceptual framework to guide this study included three focus areas. The first area examined the legislative bills that restricted collective bargaining. Since 2010, many state legislatures have curtailed the impact of public unions by limiting collective bargaining rights. Indiana eliminated 15 years of bargaining rights with an executive order in 2005, and in the same year, Missouri's government reversed a 2001 executive order that allowed state employees the right to unionize and collectively bargain. More than 800 new bills had restricted or eliminated the rights of bargaining workers in 2010 (Holger & Henle, 2011).

The second focus was organizing techniques unions used to maintain their membership, in order to remain as certified bargaining agents. National union leadership emphasized the importance of organizing to combat labor union decline (Tope & Jacobs, 2009). Clawson (2003) noted that a shift toward organizing happened with the 1995 election of John Sweeney as

president of the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO). Other unions followed the example set by the AFL-CIO. Hatcher (2017) addressed the need for labor unions to identify retention strategies for keeping membership at the required levels.

A third focus examined how organizational decisions made by union leadership focused on union survival. Potential organizational leadership theories examined included the population ecology model (Hannan & Freeman, 1977) and the resource dependency theory (Pfeffer & Salancik, 2003). The two models offered organizational survival theories that considered factors including, but not limited to, external factors, internal reaction to external factors, and resource control.

Significance of the Study

The mandate of CS/House Bill 7055 required public education unions in the State of Florida to recertify with a 50% membership density requirement (CS/House Bill 7055, 2018). In public school districts, a minimum of 50% of eligible employees must hold union membership for the union to recertify as the bargaining agent with the PERC. The previous requirement for public unions was 30%, as stated in the PERA. If a union did not meet the membership density required by the PERC, the union was at risk of not being authorized to serve as the agent to collectively bargain for the employees of that district. Losing the union's ability to serve as the bargaining agent potentially impacted salaries, benefits, and other working conditions typically handled through the negotiations process.

While unions may have initially re-certified at the required density during the first year of enactment, 2018–2019, membership could drop due to resignations, terminations, and retirements of educational personnel throughout the year. Consequently, the unions must find

ways to maintain and increase their membership continuously. Access to data on the different techniques used by various unions could be beneficial for unions attempting to increase their membership density at the local level.

Purpose

The purpose of this qualitative case study was to explore how public education unions were maintaining or increasing their membership density to meet the requirements of Florida CS/House Bill 7055. CS/House Bill 7055 was the legislative act passed in 2018 that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent.

Overview of Methodology

Qualitative methodology was most appropriate for this research, because these methods enabled the researcher to listen to the views of participants while focusing on the context of the issue. Creswell (2013) stated that qualitative studies should be used when variables are unknown and need to be explored. Similarly, Gillham (2000) explained that qualitative methods enabled researchers to "get under the skin of a group or organization to find out what really happens" and "view the case from the inside out: to see it from the perspective of those involved" (p.11). These methods allowed the researcher to approach the study without the constraints of predetermined groupings. Therefore, the researcher can study the topic in-depth and in detail; these characteristics contributed to the openness of qualitative inquiry.

A constructivist paradigm was most fitting for this study. Constructivism is built on the social construction of reality. The premise of constructivism was truth that was dependent on a person's perspective. The advantage of this approach was constructivism allowed participants to tell their stories, and the researcher captured the participants' perceptions. Andrews (2012)

discussed the tenets of social constructivism as individuals building reality through interactions with others. These realities were built through social interactions, such as conversations, where common words and language were used. Additionally, an important aspect of social constructivist theory argued that change was brought about by human activity, and that people can act as agents of change.

An aspect of constructivism was that humans were not part of an objective reality, since they constructed a version of reality while transforming that reality (Fosnot & Perry, 2005). Fosnot and Perry (2005) further stated that humans interacted with the social world through an interpretive process. This paradigm was applied to the participants in this study, because it was appropriate, in that union leaders made organizing decisions as they made meaning of CS/House Bill 7055's impact on their unions.

Research Design

The instrumental case study approach was appropriate for this type of research as it allowed focus on the issue, and those cases provided better pathways to the answers. The researcher conducted a multi-site and collective case study, allowing for the capture of multiple subjects' experiences on the same issue. The subjects in the specific cases were public education union leaders in Florida. The researcher captured union leaders' experiences and their use of organizing techniques to retain the state-mandated membership density.

Research Questions

1. What organizing techniques were used by public education unions to maintain or increase required membership density?

2. What external factors affected public education unions in maintaining or increasing the required membership density since the passing of House Bill 7055?

Data Collection

The researcher engaged in purposeful sampling. Purposeful sampling allowed identification of the cases used in the study (Palinkas et al., 2015). The researcher used a sample size of six subjects. These subjects were recruited by directly contacting public education union leaders whose unions met the membership requirement after the enactment of CS/House Bill 7055. Specifically, this information was obtained from the Florida Education Association (FEA) and PERC, the organization that monitored the required recertification documentation. Additionally, the researcher recruited participants through the FEA, the state public education labor union, as well as through professional relationships with education union members across the state. The participants engaged in semi-structured interviews using an interview protocol comprised of 12 open-ended questions (Appendix C) that allowed dialogue with participants regarding their experiences (Breakwell, 2012).

The researcher took physical notes (field notes) during the interviews, and participants received transcriptions of their completed interviews for verification (Creswell, 2013). Manual coding took place for the analysis of the verified transcripts (Saldana, 2013).

Procedures

Eligible union leaders received email invitations to participate (Appendix B), followed by appointments for face-to-face or virtual meetings. The researcher conducted interviews at mutually agreed locations or by phone. After verification of the transcriptions, data analysis occurred.

Within-case and cross-case analyses identified common themes across the multiple subjects in this study (Creswell, 2013). The researcher employed coding that organized, grouped, and identified data, which led to significant themes (Saldana, 2013). Manual coding occurred

after coding through the MAXQDA software program, which provided challenges to the researcher. Open and selective coding occurred during analysis, and codes were kept in an electronic codebook. A secured file cabinet and a password-protected cloud account for data backups secured coding, field notes, and interview transcripts. Plans for destroying data at the expiration date included shredding of physical papers and notes, including using a data eraser in the cloud account.

The role of the researcher in this study required the identification of personal values, assumptions, and biases at the onset of the study. As an officer of a public education union in the State of Florida, the researcher had enhanced awareness and knowledge of the research issue. Bracketing required this researcher to put aside personal theories, research presuppositions, inherent knowledge, and assumptions from observations during the research to maintain objectivity while capturing the experiences and perceptions of the participants involved in this study (Baksh, 2018; Creswell, 2013).

There were other ethical considerations to be considered. One consideration was individual sensitivity to the issue. Another consideration was each union's current density level and its status with PERC. A third consideration was the demographics of the union; was the union educator-only, or did the union include education support personnel? The researcher remained aware of the perceptions of union leaders during the process and understood that these perceptions were reflective of each leader, their individual union experiences, and their reactions to the new law.

Limitations

The small sample size limited the breadth of perspectives obtained in the study. Geographical distance and scheduling availability were factors in setting up personal interviews,

necessitating the capture of conversations through telephone/video conferences. Another limitation was sensitivity to the issue, where union leaders were reluctant to share their experiences.

Definition of Terms

For the purposes of this study, the following terms are defined.

Bargaining agent/representative. The bargaining agent/representative in the union is the exclusive representative to the employers of all workers, both union and nonunion, in a bargaining unit. An employer may recognize a particular union as a bargaining agent for workers, or the questions of representation may be settled by a secret-ballot election conducted by the National Labor Relations Board or the appropriate state agency (Doherty, 2018).

Bargaining unit. The bargaining unit is defined as the group of jobs in a firm, plant, or industry with sufficient commonality to constitute the unit represented in collective bargaining by a particular bargaining agent (Doherty, 2018). Most public education jobs in Florida are included in either the instructional bargaining unit or the non-instructional unit.

Collective bargaining. Collective bargaining is the process when the representatives of management and labor (the union), establish the conditions of employment through good faith negotiations, usually resulting in a written agreement (Glossary of Labor Relations Terms, 1981).

Certification. Certification is the formal determination by the authority that a particular labor organization as the exclusive representative for the employees in a particular unit (Glossary of Labor Relations Terms, 1981).

Decertification: Decertification is defined as the withdrawal of a labor organization's official recognition as an exclusive bargaining representative due to an employee-related initiation or a management action based on good faith doubt that the union continues to represent the majority of the employees, or that the unit remains appropriate due to a reorganization (Glossary of Labor Relations Terms, 1981).

CS/House Bill 7055. CS/House Bill 7055 is the legislative act that changed the union density requirement for public teacher unions in Florida.

Union density. Union density is defined as the number of workers who are members of a union as a percentage of all workers (Aidt & Tzannatos, 2002).

Summary

CS/House Bill 7055 was the legislative act that mandated new membership density requirements for public education unions in the State of Florida. This multi-site case study sought to discover how the perceptions of union leaders determined the organizing strategies used by local unions to maintain or increase membership density. This study of organizing techniques had the potential to provide information to other unions that may be at risk for decertification.

II. REVIEW OF LITERATURE

The purpose of this qualitative case study was to explore how public education unions maintained or increased their membership density to meet the requirements of Florida CS/House Bill 7055. CS/House Bill 7055 was the legislative act passed that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent. The passage of CS/House Bill 7055 in 2018 had the potential to impact collective bargaining for teachers in Florida.

While collective bargaining allowed public education unions to voice working conditions with individual district administrations, the new law limited that ability with the new density requirement. Importantly, this law removed the rights of both the unions and district administrators to settle contracts for that local district. In turn, these limitations impacted the classical bargaining model used in the past between unions and districts. The full impact of the law was unknown because the law became effective in 2018 and unions had just filed their first reports.

The literature review for this study used a variety of databases and documents. Comprehensive databases such as JSTOR, ERIC, and EBSCO, were searched, in addition to dissertation databases. Keywords used for the searches included collective bargaining, teacher union, Florida, decertification, union-busting, Public Employee Relations Act, Public Employee Relations Commission, National Labor Review Board, House Bill 7055, union member density, a right-to-work (RTW) state, Wagner Act, labor union, organizing strategies, organizational survival theory, resource dependency theory, population ecology theory, and leadership model.

Collective Bargaining, Union Recognition, and Right-to-Work Public Policy

All unions in the United States had to be validated and recognized as the bargaining unit before the start of collective bargaining. This recognition occurred by petitioning the NLRB at the national level, or by the PERC in Florida. Understanding the union recognition process, the decertification process, and right-to-work (RTW) historical patterns was a vital component of this literature review. This literature review explained the historical timeline of collective bargaining, the RTW movement, and union decertification trends, in order to provide a framework for labor union recognition requirements.

Recognition and certification processes for unions were not regulated equitably until the 1930s. Mirer (2013) provided a historiography of the National Labor Relations Act of 1935 (The Wagner Act) and explained the need for unionism in the United States. The purpose of the historiography was to explain the NLRA, discuss the challenges of the law, and offer arguments as to why the recent state legislative changes should be considered unlawful. The author defined the NLRA of 1935 as it was written that "…supported unionization and promoted the benefits of collective bargaining as the policy of the United States" (Mirer, 2013, p.31). After an examination of 24 state constitutions and legislation, the writer explained how the impact of the Taft-Hartley Amendment allowed state legislatures to pass legislation for workers' rights not to join a union—thus, creating the "right-to-work" state (Mirer, 2013). Mirer compared the Wagner Act to the 1947 Universal Declaration of Human Rights. According to Mirer, Article 23 defined right-to-work, free employment, equal pay, salaries worthy of human dignity, and the right to form and join trade unions as universal rights. Mirer presented that RTW legislation and loss of collective bargaining negatively impacted unions, because it allowed employees to benefit from collective bargaining without union membership; the author proposed that the RTW law passed

in the states of Michigan and Indiana prevented unions from protecting the interests of the workers. Mirer concluded that unions needed to evaluate developments of laws at all state, national, and international levels, in order to challenge the laws and rebuild trade unions.

Right-to-work legislation across the country continued post-World War II. Shermer (2009) examined documents illustrating labor union growth and the RTW history in the Southwestern and Western United States, including the growing movement against unionism. Shermer analyzed historical articles that recorded the anti-union movement in the Sunbelt, from the Warner Act through the early 1970s. The author reviewed the legislative bills passed in various states as the RTW movement grew, noting that many states mimicked the bills passed in states like Alabama and Florida. In addition to legislation, Shermer referenced union density data from Troy & Sheflin's 1985 *U.S Union Sourcebook*: *Membership, Finances, Structure.* Data points for 1939, 1953, and 1960 reflected union growth trends during those years (Shermer, 2009). Primary sources from local newspapers also documented union troubles as unions grew with the increase of industries through the 1950s. Political legislation, the growth of the RTW legislation in the Old South, used segregation as a tactic to deter union formation. Shermer further chronicled the union interest and growth from the New Deal Era and the growth of industrialization throughout the nation, documenting anti-union sentiment in the West and Southwest from the 1940s to the 1960s. These documents provided evidence of the correlation between anti-union legislation with low membership density in RTW states.

Collins (2012) wrote a Congressional Services two-part report, detailing the RTW legislation from the National Labor Relations Act through 2011, which defined the RTW state, as well as provisions for states without RTW laws. The purpose of the two-part report was to present a historical background of labor laws in the United States, and then examined if RTW

legislation impacted economic conditions at the state levels. The first part of the report examined legislation at the state and national levels to see if there were any patterns to RTW legislation. Collins referenced the U.S. Department of Labor, Wage and Hour Division website for the dates that 23 states enacted RTW laws. The second part of the study included an empirical analysis of factors influencing RTW legislation. Collins used this data as the basis for the three hypotheses described below.

The first hypothesis was the "tastes" hypothesis, which suggested that a pre-existing opposition to unions was prevalent in states that passed RTW laws. Identified states showed a lower rate of union density before the RTW legislation passage, and unionization rates dropped after legislation passed (Collins, 2012). The second hypothesis, the free-rider hypothesis, proposed that optional dues payments led to workers refusing to pay dues, because those non-members paid no dues under the collective bargaining contracts. The free-rider hypothesis suggested that RTW legislation led to higher union dues; the data projected that 70% of the non-members refused union membership and sought employment elsewhere. The bargaining power hypothesis was related to the free rider hypothesis; Collins presented that RTW laws reduced the union bargaining power, leading to loss of membership. An important component of the third hypothesis was that unions had less incentive to organize, since only part of the bargaining unit paid dues, impacting the importance of union jobs.

Collins (2012) reported that unions have declined in membership since 1983. This decline included the impact of RTW legislation. The decline indicated that other factors, such as unemployment levels and wages, also impacted union membership. The author concluded other reasons impacted state levels independently and that "…comparing outcomes in states with and

without RTW laws [provided] limited perspectives…but states' economies are extremely complex…and no consensus will be reached in the near future…" (Collins, 2012, p.14).

According to Aoyama, Murphy, and Hanson (2011), an economic geography was defined as a branch of geography that examined the impact of economic forces in specific locations and shaped the processes of the key elements (labor, businesses, and countries) and drivers (institutions, accessibility, and innovations). Peck (2016) provided the economic geography of RTW laws in the modern era. Peck discussed the locations of right-to-work legislation, as well as the RTW states' shift from the New Deal Era through 2008. Peck's purpose for the legal review was to find the causation of state legislators passing RTW legislation.

Peck (2016) hypothesized that there were two phases of RTW becoming a regulatory project through legislative engineering. The first phase came from legislative bills from states that documented the early RTW movement. The author illustrated the patterns of RTW growth as a checker-board view of the unionized states versus those that curtailed union movement after World War II. Twelve states recorded rapid growth during the 1940s and six states in the 1950s. Within the next 30 years, three states had passed RTW legislation: Wyoming (1963), Louisiana (1976), and Idaho (1985).

The rigidity of political legislation limited union influence outside the industrialized North. These limitations resulted from media and pamphlet campaigns by state organizations, such as the Fight for Free Enterprise and the John Birch Society. These local groups aligned with national organizations that claimed that unions limited free choice, increased the cost of business operations, and were communistic (Peck, 2016). This mindset remained until corporations transferred to the New South, lured by business-friendly packages offering low-taxes, lower cost of living, and lower wages.

Corporation influence dominated the next two decades, as business-centric legislation passed at local, state, and national levels, in attempts to limit the union movement. The second phase of the RTW movement was evident in the anti-union movement's resurgence. Peck (2016) analyzed national legislation that defeated national labor-law proposals, as well as the failed national RTW law that had been heavily promoted. Peck created a data table that captured the lowering state union density in 2014 versus the increasing number of "free riders" in RTW states, or non-unionized states, with statistics drawn from the U.S. Bureau of Labor Statistics Current Population Survey.

An analysis of the 2014 Bureau of Labor Statistics evidenced that 25 metropolitan areas provided data points that more states were moving away from private labor and moving towards limited public-sector unionism (Peck, 2016). Using the National Conference of State Legislatures data, Peck compiled a table displaying four columns: legislative control, governor political party, state control, and RTW status of all 50 states in 2009 and 2015. The table suggested increased Republican presence at the governor level, state level, and national level showed efforts to move more states to RTW status to favor business interests.

Finally, Peck (2016) examined the anti-collective-bargaining legislation in several states that moved many states to RTW status, including former unionized states, such as Wisconsin, Indiana, and Michigan. Peck noted that there were growing non-union and non-RTW states, known as RTW zones, where local cities and counties received model RTW legislation bills. Peck discussed the countermovement started in response to the RTW movement by acknowledging the membership growth in public sector unions in some states, as well as the alt-labor movement legitimized through social media. The data used in this economic geography of labor studies offered three implications.

The first implication suggested that the labor relationship with state economics existed through "coevolving" corporate structures and the challenges of labor regulations (Peck, 2016). The second implication was that state and national legislative movements shifted the political, economic, and labor landscapes, which impacted union activity. The last implication stated that, as corporations modernized, labor unions sought new ways to increase their number of members through creative mobilization strategies to maintain a presence. This data framework provided two main conclusions; the growth of legislative bills fostered an anti-union ecology in the current political climate, and the labor movement could not keep its current organizing efforts to maintain a union presence. Peck stated at the end of his study that economic geographies were one way to monitor the anti-union movement through legislation but was not the only factor in lowering union density.

Wade (2015) discussed the continuous movement of states passing RTW legislation during and after the Great Recession. Wade looked for economic indicators on both ends of the Great Recession (2007-2014) in 2,500 legislative bills. The bills' content and outcomes provided data about the perceptions of state government as they tried to balance the budget. Many state legislators felt that the state pensions were underfunded and strained the annual budgets. State legislators believed that labor-reform measures would have balanced the state budget successfully. Wade proposed two hypotheses: (a) enacting right-to-work laws and collective bargaining restrictions were a result of economic indicators influencing state economies that were perceived as over-burdened by public-sector employee expenses, and (b) the anti-labor reforms targeted specific occupations based on perceived political affiliation. Wade's research evidenced the following conclusions: (a) all labor-reform bills did not have the desired consequence of activating labor unions to take organizing action, and (b) that K-12 teachers

received the brunt of the reforms, since not all of the occupations were targeted evenly in the reform process. Legislators sought to change the mandatory bargaining procedures in over 400 bills and strived for change in union certification process in 240 bills.

Wade (2015) noted that there was no consistency in how wording for labor reform agendas occurred in the bills. Some state legislators presented stand-alone bills, while others inserted wording in another bill as part of a package. Wade coded the types of bills introduced by legislators that signaled their interests in issues that were labeled pro-union or anti-union. Over 21 state legislatures introduced more anti-union bills than pro-union bills. Wade also tracked the partisan status of legislatures and governors across all states and performed his analysis with the following variables and controls. The dependent variables in the study were (a) four different legislative sessions in two-year increments between 2007 and 2014, (b) bill introductions and bills categorized into pro-labor or anti-labor categories, and (c) bills counted for each state legislative session. The binomial regression analysis determined that there were significant positive relationships between unfunded pensions, unemployment rates, and public/private membership differences. The economic indicators of a strong budget, higher housing appreciation rates, and a liberal state ideology were negatively correlated. Wade reviewed specific legislative bills that targeted union work and specific public-sector unions. During the proposed period, bills contested 11 areas that impacted union work, including impasse, collective bargaining restrictions, collection of union dues or fees, and right-to-work policies. Teacher unions were identified as the public-sector union that faced stringent bills meant to weaken or eliminate their presence.

Wade (2015) also examined the campaign contributions to both parties during the selected years and posited that there was a correlation between campaign contributions and

legislative bills impacting teacher unions. Wade performed a second binomial regression where predictors positively correlated increased labor-restrictive proposals with higher political campaign contributions to Democratic parties, more professional legislatures, larger pension liabilities, and greater union density. In contrast, negatively associated predictors included higher contributions to Republican candidates, stronger budget reserves, more liberal state ideology, and larger donations from state unions.

Wade (2015) discovered that estimating the baseline model through Clarify, that 61% of the bills targeted the K-12 teacher population. The number of bills doubled based on donations to Democratic campaigns but decreased, almost by over a third, when contributions increased to Republican campaigns. Wade examined the political contributions of law-enforcement and firefighter unions and found a correlation that those unions were not subject to the same punitive legislation that faced teacher unions. Based on the various datasets of economic indicators, legislative bills, campaign contribution records, and union density, Wade concluded there was a direct correlation to the anti-union movement and the passage of RTW legislation during the 2007-2014 time period, suggesting that further research was needed to see if patterns continued in future legislative sessions.

Wisconsin Act 10 was one state-specific example of legislation that impacted collective bargaining. This bill was also known as the Wisconsin Budget Repair Bill that passed and was enacted in 2011. This law impacted public unions negatively by limiting collective bargaining rights, fair share agreements on dues payments, and collective bargaining agreements. The amended law defined two new requirements for public sector employees. The statute separated public safety employees' collective bargaining from other municipal employees, and the law

required a separate employee vote for contract changes (Wisconsin Act 10, Sections 219, 223, 246, 252, 2011).

Under the new bill, municipal employees were categorized into as few groups as possible to eliminate fragmentation and maintained as few collective bargaining units as possible (Wisconsin Act 10, Section 240, 2011). The most restrictive section applied to all public workers, including education professionals, and stated that an election must occur every year to certify the collective bargaining unit representative, and any representative that received at least 51% of all general employees' votes. If no representative (or bargaining agent) received at least 51% of all general employees' votes, the commission decertified the representative (Wisconsin Act 10, Section 289.111.83, 2011). Further language in Section 289 mandated that general employees might not be included in a collective bargaining unit for 12 months from the date of decertification. This bill's ramifications significantly reduced the ability of many public unions to re-certify as the bargaining agent.

Establishing the bargaining agent was traditionally done through the authorization and certification processes described under the NLRB. Unions, both public and private, experienced setbacks when there were challenges to the certification process. One challenge in the labor movement was the continuous use of RTW legislation as the primary tool to hinder the labor movement. The historical precedent has shown states that fostered RTW legislation showed a decrease in labor union density, because employees chose free-rider status over local union membership.

Union Decertification

When a work site chose to unionize, employees filed a document with the National Labor Relations Board (NLRB), including the signatures of at least 30% of the eligible employees that

met the density requirements of the Wagner Act. The Labor Management Relations Act of 1947 (Taft-Hartley Act) discussed the steps for the decertification of unions for employees to choose a different bargaining agent. There was a process that members followed if members felt the need to change the bargaining agent for collective bargaining purposes. Union de-authorization meant that the union no longer served as the bargaining agent, and union decertification meant that the union members chose to disband the union.

Anderson, O'Reilly, and Busman (1980) studied union decertification and noted that membership loss and growth occurred in vacuums of national economic, social, and political conditions. The authors used the Ashenfelter and Pencavel (A-P) model, a regression model which examined the relationship between changes in aggregate union membership between 1900 and 1960 and several variables measuring economic, political, and social conditions (Anderson et al., 1980). Anderson et al. used this model to run a regression on union decertification data for the time period 1947-1977. The research used the following dependent variables: (a) the yearly number of voters that chose decertification in NLRB elections, (b) the annual number of elections resulting in decertification compared to the aggregate election activity, and (c) the annual percentage change of voters and elections that resulted in decertification. The study used the following independent variables: (a) the average rate of employment change, (b) percentage of union sectors already unionized, and (c) the percentage of Democrats in the House of Representatives to proxy for public opinion towards unions.

Anderson et al. (1980) performed a standardized regression model for each dependent variable. Results showed the individual coefficients in the regressions meant that relationships were not consistent with hypotheses. When there were more drastic changes in the cost of living and unemployment, the number of voters and elections that decertified unions increased. This

result was contrary to the prediction and further explained that, when those economic indicators were present, existing unions were more likely to be decertified. The researchers concluded that decertification elections occurred more often when there was adverse economic activity.

Jelf (1998) conducted a three-part empirical study of decertification and deauthorization voting behaviors with the purpose of determining the impact of union elections. Union elections were the vehicle for employees to vote for authorization, deauthorization, and decertification. Authorization meant that eligible employees voted for the union to act as their bargaining agent. Deauthorization allowed members to choose their bargaining agent. Decertification was the strongest measure members took by outright rejecting a union as their bargaining agent. This process meant that employees underwent the process of disbanding the union or choosing a new agent.

Jelf (1998) hypothesized that there were three areas to examine for the union decertification rate. Primary factors in the decertification included pay scale between union/non-union workers and the local unemployment rate. Utility and financial factors defined economic indicators of unemployment rates, profit margins, employee net income, and wage differentials for union/non-union employees. The second area, workplace voice, was defined as the expectation of a safe, fair, and equitable workplace outside of standard benefits and wages. This area included unfair labor practices, injuries/illness on the job, and professional (white-collar) vs. trade (skilled craft) industry. The third area, social-political, was defined as union affiliation, local/industry union density, RTW state status, voter-turnout, ethnicity, and gender. Jelf acquired 1984-1995 local unemployment rates (LURs) for metropolitan statistical areas (MSAs) from the Department of Labor, Bureau of Labor Statistics, and Office of Local Area Unemployment Statistics, focusing on single-union elections.

The author matched the MSAs economic indicators to the NLRB cases by the bargaining unit election date, demographics and the number of voters for each election. Jelf (1998) performed a single-model regression of 14 factors defined in the three areas and discovered that 10 of the 14 were negatively associated with decertification. Jelf concluded in the first study that utility and workplace perspectives played a more significant role in determining satisfaction with the union, being the impetus for decertification made on a rational basis. Social-political areas had a null effect and did not contribute to significant factors overall. This author concluded that when local conditions were favorable with satisfactory job security, benefits, and wages, there was less chance of decertification. In those states that identified as an RTW state, there was higher decertification due to the "free rider" effect.

The second study questioned if the same factors that impacted decertification could accurately predict faster deauthorizations if there had been an earlier decertification vote (Jelf, 1998). Jelf named the action as the early warning signal hypothesis. Deauthorization poll data from the NLRB archive for the years 1984-1995 were pulled and analyzed with the same factors used in the first study. The independent variable in the data used only non-RTW states, as RTW states do not have deauthorization polls. Jelf concluded that the early warning signals, such as a decertification election or deauthorization vote, had no direct correlation to the rejection of the union in either part of the study, enabling "free riders" in RTW states to benefit from that status rather than paying dues.

The third study questioned whether unions would become stronger or weaker if the rules changed for deauthorization and decertification. The historical background for this study discussed the implications of the NLRA of 1935 that standardized union certification laws and the changes in laws in two following pieces of legislation, the Taft-Hartley Act of 1947, and the

Landrum-Griffin Act of 1959. Jelf (1998) hypothesized that changes in legislation would impact union rejection at the state or national levels. This hypothesis was based on the original model by Alhburg who that calculated several pro-union votes divided by total votes to determine election turnout; a proportion of five meant that the union won the election(Ahlburg, 1984). Jelf performed two simulations based on the original study but with four changes in the variables: (a) no certification elections, (b) data from the NLRB from 1984-1994, (c) use of decertification data, and (d) the number of abstentions in an election. The simulations performed by Jelf concluded that the variation of voting rules could significantly impact union or management success in elections. Finally, Jelf summarized those changes in labor legislation across the United States in earlier years correlated with his second hypothesis.

Scott, Hester, and Arnold (1995) provided an analysis of the increasing numbers of union decertification with the purpose of seeing if union decreases occurred in certain geographic regions of the United States. The authors compared recent decertification data from the NLRB spanning the years 1979-1990. Unions filed 19,337 decertification petitions, held 9,531 elections, and decertified 7,093 unions. These records also provided the number of eligible voters and the actual number of voters in the election, which illustrated a decrease. There was an average of 21,629 members lost during the time indicated because of the decertification process; this number doubled the average number of members lost since 1978. Scott et al. noted that the number of decertification petitions doubled to 18.3% compared to the earlier 8.5% in the prior decade.

Scott et al. (1995) indicated that when unions filed a decertification petition, the next step was an election; election results determined the worksite's decertification status. The aggregated data indicated that 74.4% of elections resulted in decertification. The authors theorized that one

phenomenon occurred due to an increase in numbers of bargaining units with less membership. The authors compared their results to a similar study from 1980 and found that the number of votes cast for decertification rose over 30%. Decertification occurred in specific industrial and geographical areas. Sixty percent of decertification elections were filed in the Central and Western states, while the Mountain states only showed 6.3 percent. The same data reflected that decertification patterns followed the same patterns of initial union certification in the same regions. Decertification by industry area was varied and had not followed any regional pattern. Skilled trade areas (mining, construction, service industry) showed a higher decertification rate when compared to the areas of finance, retail, and transportation. A noted difference occurred with the comparison of the certification to the decertification ratio. The construction and transportation industries were underrepresented, while the retail and finance industries were overrepresented. In conclusion, the findings of this study presented a variable picture of decertification from 1978-1990, as union membership numbers continued a steady decrease.

Union Organizing Challenges

The cornerstone of any union in order to be recognized was the membership density required by state or national law. Union leadership experienced both opportunities and roadblocks in gaining membership. The impact of RTW laws was that all members of the bargaining unit benefited from the collective bargaining process without paying for union membership or their "fair-share" for the bargaining process. The recent landmark case *Janus v American Federation of State, County, and Municipal Employees, Council 31* (2018) cemented the RTW status when the United States Supreme Court ruled non-union members no longer had to pay the agency fees for the union's cost in collective bargaining contracts. This decision

eroded the opportunities for potential membership in public-sector unions and decreased density. This section focused on the many challenges that impeded union member density.

Marianno (2015) questioned how legislative bills altered teacher rights and protections. Various legislative bills impacted state and national union growth and the collective bargaining process for teachers across the country. The purpose of Marianno's study was to examine how legislation specifically impacted teacher unions. Marianno conducted a mixed study that sought to describe patterns in the proposal and enactment of bills related to teachers' unions, collective bargaining, and traditional union-guarded protections. Marianno examined teacher collective bargaining legislative bills from all 50 states for the years 2011-2013. Marianno generated a dataset of all proposed and enacted legislation concerning teachers' unions and teacher collective bargaining agreements using the National Conference on State Legislatures and Lexis Nexis State Capitol.

Marianno (2015) reviewed 29,026 bills; elimination occurred for duplicate bills and non-teaching personnel. The remaining 2,625 bills were coded as either restrictive, neutral, or enabling, based on the intent or topic of the bill, being coded a second time by bill status as enacted, pending, or failed. Conclusions from this dataset showed that there were more legislative bills filed in 2011 in six states than any other year in the study. The data also showed 23 states proposed at least one education collective bargaining bill between 2011 and 2013. Twenty different states proposed bills regarding collective bargaining and labeled 70% of them as restrictive. Marianno noted all comprehensive bargaining laws focused on reducing teachers' bargaining rights.

The top 10 states that incurred the highest percentage of restrictive laws against collective bargaining and teacher job benefits were Wisconsin, South Carolina, Nebraska, Kansas,

Michigan, Virginia, Wyoming, Idaho, Washington, and Florida. Eight of 10 states with the most constrictive laws showed either bipartisan or Republican control of the state legislature. Marianno (2015) concluded that the proposal and enactment of most state-level legislation was designed to restrict collective bargaining agreements that benefited educators, and that more research was necessary to determine if and how the factors will shape union policy in those states.

Chaison (2010) performed a study on union density attrition with the purpose of determining the number of new members needed to combat the annual member loss in employment through terminations, resignations, and retirements. Chaison used Census Industry Code data from the Bureau of Labor Statistics to examine the change in membership in labor unions from 2003-2008. When examining employment increase and decrease, the data set showed that new jobs by union members averaged 19%, and those jobs lost by union members decreased an average of 24%. The last dataset included union membership density from 1998-2008. Data points showed that density was highest in 1998, at 9.5%, and decreased to 7.4%. Chaison calculated that annual membership must increase for union density to maintain or increase by one percentage; there would have to be a significant increase in new membership. Chaison concluded that unions would have to increase density by one million members to raise a single point in 9 of the ten years. The implication for future research was that unions must significantly increase their numbers to arrest attrition in a declining labor market.

Dixon (2010) explored the labor union growth as a social movement organization and how employers sought to repress growth, perceiving it as a threat. Dixon's study consisted of a historical analysis of right-to-work adoption laws in states between 1946 and 1960, using data from the U.S Bureau of Labor Standards. Dixon hypothesized that the labor union movement

should have grown in the post-New Deal era, due to the Taft-Hartley Act's implications. Dixon found that the more employers perceived unions as a threat, the more likely businesses pushed for right-to-work legislation. The study showed that although right-to-work legislation started nationally, by 1960, it was reduced primarily to specific regional areas. Factors studied included ties to national labor organizations, labor division categories, union strength, union density, and union opposition. Dixon concluded the study with findings that some areas of the country advocated for strong businesses to overcome weak unions.

Shelton (2017) provided a historiography of the anti-union movement from the mid-1960s through the present time. In this timeline, the author discussed the influence of the National Right to Work Committee (NRTWC), an organization focused on fighting compulsory unionism. Shelton presented two approaches used by NRTWC to find individuals willing to speak against union. The first approach was finding teachers dissatisfied with paying compulsory union dues to cover the costs of collective bargaining in states, such as Michigan and Ohio. The second approach was building the movement of anti-union sentiment as a branch of the civil rights movement claiming, “excessive union power at the expense of the individual (white or black) represented a civil rights violation in the highest magnitude” (Shelton, 2017, pp. 385-386).

The NRTWC went so far as to use popular magazines, such as *Reader’s Digest*, to influence the American public that unionism was wrong. This tactic proved to be stronger than the union movement realized. Albert Shanker, then president of the American Federation of Teachers (AFT), attempted to persuade the periodical to cease printing of the articles, but the digest continued to publish articles against the union movement. The author also presented the national Congress's attempts to reform the Taft-Hartley Act of 1947 with legislation known as

the Labor Reform Act of 1977. As the bill passed through committees, anti-union forces worked heavily to convince the public that labor unions were corrupt and compulsory unionism was wrong for public sector organizations, including educators. The author concluded that the influence of the anti-labor union organizations over a decade eroded the support for a robust labor presence in the United States and led to the belief that "collective organization by workers were, at best, no longer relevant, and at worst, economically and socially disastrous" (Shelton, 2017, p. 396).

Holger and Henle (2011) performed an empirical analysis examining the impact of worldview concerning union membership in public sector employers. The study used information from the Department of Labor website to determine the number of right-to-work states from 1943-2010, comparing the number of unfair labor practices to the number of union certification petitions filed from 2000-2008. The results showed that unfair labor practices were negatively related to union density, with a 14% variance. The results also demonstrated that a 55% variance in public union density when adding a cultural view as a second variable. The researchers concluded that public-sector unions had a lower membership density in right-to-work states. As a result of their research, the authors suggested labor unions would do better to repeal the right-to-work laws in existing states and focus on changing those states to at-will employment.

Nack, Childers, Kulwiec, and Ibarra (2019) discussed the challenges faced by public sector unions since the passing of Act 10, also known as the Wisconsin Budget Repair Bill, which was the controversial law that eliminated collective bargaining for public sectors in Wisconsin. The new bill required public workers' unions undergo annual certification votes to maintain their status as the exclusive bargaining agents. Nack, et al. (2019) proposed the law's

impact was more restrictive and assessed how unions adapted under the new law. The authors examined labor union membership records at the state and national levels for four major public unions and conducted interviews with the leaders of the four unions leaders. Unionization rates dropped slightly more than 50% from 2011-2015 and seemingly correlated with the post-bill effects of Act 10.

Prior to the bill, public sector unions in Wisconsin historically held union density well above the average but dropped below the national average of 35% by 2015, with a loss of 136,000 members. Before Act 10, only the state of Virginia had shown such downward slope in union density, with its highest decrease of 38.5% in 1972. The authors conducted interviews with the largest four unions to discover how the unions met the challenges. Within one year of Act 10, the American Federation of State County and Municipal Employees (AFSCME) experienced a decline in membership of almost 55% to 28,745 members; by 2017, there were only 7,520 members statewide (Nack et al, 2019.

AFT-Wisconsin saw a similar decline in membership; total numbers dropped from 17,000 in 2011 to 3,000 members by 2018. Service Employees International Union primarily represented public workers in the medical field, home health care, and non-instructional education employees; this union reported a loss of members from 8,189 to 2,592 in six years. Wisconsin Education Association Council (WEAC), an affiliate of the National Education Association (NEA), represented educational instructional and support staff. Their members were categorized slightly differently because employees were part of the local school district (Nack et al, 2019)

WEAC had two affiliates—aspiring educators and retirees—that were counted among members. The organization dropped from 98,000 members to approximately 45,000 members by

2017. Instructional staff membership dropped from 69,000 to 39,000. All four unions experienced a loss of funding due to the large membership decrease. Nack et al. (2019) documented these four unions' attempts to recover successfully, but some unions did not. AFT-Wisconsin followed the labor-management model by downsizing, but did not survive in all areas, even when an offer to merge with WEAC occurred to stabilize the union.

AFSCME chose to reorganize after decertification and replicated its organizational structure with local governments to focus on a service model of unionism. Service Employees International Union (SEIU) chose the option to place its education custodial and food service members into a larger affiliate union, then moved completely into the private sector. WEAC went through its restructuring as well. Before Act 10, WEAC followed the Uniserv structure, that was top-heavy in NEA or state affiliate professional staff focused on organizing. After Act 10, the restructured model placed local unions into eight education staff regions, one retiree region, and one region of aspiring educators. One result was that organizing initiatives and responsibilities fell on local union members who accepted the roles of organizers and education activists formerly held by professional organizers. Local presidents met with local boards to establish working conditions, and union members actively recruited non-members. Reduced funding required more creativity to grow membership. Methods included a social media presence, professional development to members, representation, and internal organizing. Of all four unions, WEAC was the most successful and modeled the most effective changes to combat membership loss. Nack et al. (2019) concluded that, as much as Act 10 damaged public union bargaining rights, the bill created opportunities for innovative organizing strategies and a new form of organizing referred to as public worker unionism.

The literature in this section presented many of the challenges that faced unions in maintaining density. Membership decreased for many reasons: attrition, political climate, right-to-work legislation, and a decrease in pro-union industries. The studies above also showed that unions examined how to grow their membership because of these various challenges.

Union Membership Strategies

In order to overcome the loss of union membership, unions must find ways to continue growth. Fiorito and Jarley (2012) conducted a study with the purpose of finding organizing strategies used by unions from 1990-2004. The authors presented that there were three components impacting organizing strategies: union membership/organizing strategies, environmental influences, and organizational influences. The authors defined the environmental influences as employment growth, union density, and employer opposition. Organizational influences, (identified by the authors as the unions) were defined as rationalization, innovation, de-centralization, democracy, and strategic scope. Membership and organizing strategies included membership count, NLRB elections, and NLRB organizing activity. There were two control variables in the study: (1) the "Sweeney Era" identified as the time that John Sweeney, influential labor leader, served as president of the AFL-CIO with a dummy variable as the control and (2) Non-NLRB Jurisdiction defined as the dummy variable marking labor cases that included public sector, transportation, and other unions outside the NLRB definition (Fiorito & Jarley, 2012).

Fiorito and Jarley performed a quantitative analysis with over 15 years of data for the three components. Membership organizing and data were extracted from various union sources: the 2006 *Gifford Directory* series (a study of membership data from national unions), union reports from the Office of Labor Management Standards, biennial per capita dues payments for

AFL-CIO members, annual per capita dues payments for AFL-CIO members, and NLRB election data that presented the number of closed elections and the number of eligible voters participating in the NLRB elections. Environmental data came from employer opposition data of the number of unfair labor practices, and 2003-2007 Hirsch and Macpherson Current Population Surveys that provided employment growth and union density. The General Social Survey that surveyed worker attitudes about union leadership and major corporations used the indicators "...a great deal…only some…and hardly any" and assigned values to them that defined the ratio of confidence in labor unions confidence in major corporations (Fiorito & Jarley, 2012, p. 475).

Two separate surveys, the 1990 National Union Survey and the 1997 Survey of Union Information Technology, used a four-point Likert scale to measure the following union characteristics: union structure of activities, perception of union organizing strategies, leadership decision-making levels, and the extent to which the union used resources to do the work of the union (Fiorito & Jarley, 2012). Fiorito and Jarley analyzed the data with simple correlations and estimates from multivariate regression methods, pooling data from cross-sections of union activity and time (era) units. Fiorito and Jarley also used a fixed-effects model if there were only two time periods available. This was explained that "…all variables are differenced…any time-variant influences specific to a union drop out of the process…" (Fiorito & Jarley, 2012, p. 476). The authors believed that this model was specific to the organizing activity levels.

Fiorito and Jarley (2012) hypothesized that workers want to join unions, but factors, such as organizing strategies, union representation, employer opposition, and union saturation levels, deterred them. The authors posited the following findings from their calculations. Data for organizing activity showed that using the control variables had little impact between the Sweeney and non-Sweeney eras. The non-NLRB variable presented that non-NLRB unions

were less likely to participate in NLRB elections if union jurisdiction changed. The pooled results for environmental factors showed that union density, employer opposition, and latent demand had no support, but employment growth had a significant impact. Support was found for the positive effects of decentralization, but there was no significant support for the factors of rationalization, innovation, and strategic scope. The authors believed that since there was little significance, organizing activities were random occurrences with random effects. Time-variant occurrences influenced organizing and predictors showed bias. Pooled results for membership growth that used election win rates combined with organizing activity showed a positive effect on membership growth when correlated with employer growth. There was no significant evidence for union density. Negative effect of employer opposition was significant, but union characteristics were not significant. The model also supported that variance in organizing activity was more important during the Sweeney era. The first differences model that used the time-variant influence dropped the Sweeney-era and non-NLRB factors, showing that only employer opposition was strongly negative and was a strong factor in differences in organizing activity (Fiorito & Jarley, 2012, p. 478). The authors theorized that there were several variables that forced limitations, thus influencing their inferences. Fiorito and Jarley presented four implications: (1) there was no evidence of a Sweeney era surge in activity but there was a growth in membership, (2) unions tended to stay in their original jurisdictions, and non-NLRB unions were reluctant to organize under the NLRB, (3) unions focused more on organizing activity when the economy was favorable, and that employer opposition increased organizing costs, and (4) decentralization of leadership decisions moved towards member-driven organizing strategies. The authors concluded that, despite the limitations, missing measures, missing data,

employer opposition effect, and variances in organizing strategy, employees wanted to join unions, and that unions needed alternative organizing strategies to capture these prospects.

Hatcher (2017) conducted a qualitative case study with the purpose of identifying reasons that union members maintain membership once they have joined a union. The author interviewed ten participants from a government firm and ten participants from an industrial firm. The participants were a random sampling of current and past union members, union leadership, and non-union managers. The researcher used ten open-ended questions for the interviews and transcribed the interviews using TranscribeMe. Data analysis occurred by using NVivo11software to determine patterns and themes. The results included the primary reasons for staying with the union, to be union representation, quality of member services, and union activeness. Reasons for non-membership included poor union leadership, poor communication, and poor negotiation of contracts. Hatcher posited that non-membership influence was significant in determining membership and union decline in the local area of the study. The study by Hatcher provided a foundation for understanding membership retention in recent years.

Gibney, Masters, Zagenczyk, Amlie, and Brady (2012) performed a study with the purpose of examining the social exchange impact upon union membership. The authors introduced the concept of perceived union obstruction (PUO), hypothesizing how the social-exchange perspective affected union member participation and retention. The authors referenced a social-exchange study by Shore, Tetrick, Sinclair, and Newton (1996), that union members maintained an active part of their union, because the union valued the well-being of the membership and member contributions, recording a positive relationship known as positive union support (PUS). These researchers questioned whether positive and negative relationships in the social exchange impacted union attitudes.

Gibney et al. (2012) suggested the idea of perceived union obstruction (PUO), which is defined as the belief of a member that the union is detrimental to the member and hinders member goals and objectives, may significantly impact the value of the union to the member, a contrasting idea to previously published studies that focused on positive union engagement. Six hypotheses were constructed based on the idea of social-exchange interaction between the union and the worksite, union member and union, and union member and worksite. One hundred sixty-eight union leaders participated in the mail-in or in-person survey, that measured social-exchange relationships and union commitment using a 7-point Likert Scale. All scales used had a Cronbach's alpha ranging from .80 to .95, that determined the reliability and internal consistency of the instruments used in the study. The control variables were gender, tenure, and age. The dependent variables were the perceived obstructions or supports of the unions and worksites. The researchers performed hierarchical regression and ANOVA analyses, and the data results provided evidence that supported the following conclusions. The first conclusion was union members who had positive interactions and perceptions with their unions were more likely to remain active and support union work; negative interactions and perceptions of the union led to higher support of the workplace with less support to the union. The conclusion was that negative relationships had a more significant impact than positive relationships. As a result, the researchers stated that the perceptions of union obstruction and organizational obstruction were the strongest predictors of employee participation in the union or the organization. Adverse treatment from the organization caused a higher likelihood of increased union support, and adverse treatment from the union caused a higher likelihood of increased worksite support.

Implications from this study suggested that unions fared better by negative campaigning of the organization and positive support from the union, whereas organizations fared better when

providing a negative union voice. Gibney et al. (2012) concluded that, if union members experienced positive interactions with the unions, they were more likely to support union work; members who experienced negative interactions resigned from membership, because dues-paying was optional. An unexpected finding was that the only way employees distanced themselves from negative voice of both union and worksite was to leave the organization. This study's results implied that perception impacted union membership, and that dissatisfied members either resigned from the union, or called for a decertification/deauthorization vote, ultimately leading to loss of representation for collective bargaining.

Using AFL-CIO documents, union membership records, and National Labor Relations Board archives, Hurd (2004) reviewed the loss of union membership and how unions sought to recover that membership through the early 21st century. As major industries moved towards globalization and outsourcing, leading unions, such as the United Auto Workers and United Steel Workers of America, suffered a drastic loss in membership. Membership loss increased in unions across the country, and top unions decided to act by discussing the restructuring of the labor union model. Prominent unions developed a committee whose charge was to develop a new plan for organizing.

This strategic plan, known as *The Changing Situation of Workers and their Union*, was published, making four recommendations to promote union membership: promote worker interest in union programs, improved communication, improved organizing, and increasing member participation. Although the AFL-CIO failed in its first major organizing attempt under this new plan, smaller unions across the nation followed the recommendations to invest in their membership. The unions soon developed different organizing models, and the models engaged in different strategies to grow membership. Hurd (2004) discussed the creation of the primary

model as the "organizing model" and focused on “involving members in solutions” with an emphasis on internal organizing (p.8). Aspects of this model focused on the general membership to promote shared decision-making and activities to provide a sense of union pride and ownership. The critical component of this plan was the 1989 establishment of the Organizing Institute that identified and trained individuals to recruit potential members in local campaigns. This model gained much support in its early stages until the early 1990's, stagnating when the focus shifted from external organizing to member representation. Internal leadership conflict led to different perspectives of whether the union focus should have been organizing or focusing on member services. In 2000, the AFL-CIO again led the restructuring of its organizing programs. The primary goal of the new campaign was to assist and guide unions that invested resources in organizing as its priority to recruit one million members in a year.

Most national unions affiliated with the AFL-CIO replicated the practice of reserving 30% of the budget for organizing resources, but many smaller unions preferred to retain their authority over their organizing campaigns. Strategies included recruiting outside traditional industries. Even though there was a higher success in recruiting new members, the strategy was not enough to raise membership to desired levels due to inconsistent methods. The 2002 Hirsch and Macpherson’s *Union Membership and Earning Data* book provided membership numbers for the ten industries with the highest number of members; data showed a noticeable drop in membership over time even with heightened recruitment efforts in nine of the ten industries (Hurd, 2004). Hurd suggested that unions had used outdated methods with a top-down approach that resulted in a fundamental weakness in organizing strategies. SEIU, a major union, suggested another restructuring with an emphasis on harnessing member power as an alternative to the AFL-CIO model, but this model did not provide enough member engagement. Hurd concluded

that the weakness in organizing could only be overcome with a transformation model of strategic planning that included member education, overcoming resistance by reluctant leadership, and a healthy balance of representation with organizing.

Milkman and Luce (2017) questioned the factors that impacted union membership after the Great Recession and the way unions combated membership decline. Union density records from the NLRB illustrated the decrease in almost every industry between 2006 and 2014. Nursing, law enforcement, and correctional institutions were the only industries that increased membership over that period. Milkman and Luce described the top factors impacting loss of union membership that came from job loss, replacement by non-union staff, and anti-union sentiment organizations influencing politicians. The downward trend in membership required that unions organized using non-traditional practices. How do unions make up for the membership loss? The researchers found that the alternative-labor movement provided new members that jumpstarted local unions by recruiting underserved industries and populations.

One organizing strategy was to partner with worker centers where most workers were working-class immigrants who needed advocates for better wages and better working conditions. By partnering with these alternative worker centers, unions found an incentive to take up social justice issues, such as the minimum wage movement, labor violations, wage theft, and unfair labor practices. Using AFL-CIO records, Milkman and Luce (2017) found that the number of worker centers grew from 137 in 2003 to 230 by 2013, sprouing new locals, such as the National Domestic Workers Alliance, Food Chain Workers' Alliance and the National Day Laborers Organizing network. Milkman and Luce concluded that unions increased membership by partnering with worker centers and actively working on social justice issues relevant to their new members.

Another strategy that unions had to consider was the introduction of social media as a communication tool. Bryson, Gomez, and Willman (2010) presented a historical narrative that examined how society moved from the 1950's communal society, where information was disseminated through group gatherings, to the new millennium, where information is conveyed through platforms, like Facebook. The authors recounted one example where a union member in Canada used the Facebook platform as a tool to organize for his local union. The authors hypothesized that if unions followed social trends in communication, there was a higher chance of increasing membership. This type of union voice was believed to show a positive view of selling unionism to a larger audience with no exposure to unions. The authors stated that "…neglecting the Internet is one reason why union growth has stagnated" (Bryson et al., p. 42). The authors concluded that the traditional model of unionism was an outdated view and that unions needed to find ways to appeal to society in a mass-media format.

The recent restrictions through collective bargaining laws challenged teacher union organizing efforts. Educating new teachers on the benefits of unionism can be done through socialization. Pogodzinksi (2012) investigated how teacher unions approached the process of gaining new members from younger generations with little or no exposure to unions. Pogodzinksi surveyed union leaders in ten districts to discover how they approached socializing new teachers to the profession and to unionism. Surveys took place in the states of Michigan and Indiana in the years 2007-2008. Nine of the unions were affiliated with the National Education Association and the remaining union was affiliated with the American Federation of Teachers.

Pogodzinksi (2012) noted that Indiana was an RTW state, where education employees were not required to join a union or pay fair-share bargaining fees. In contrast, Michigan still required teachers to join the union or pay the fair-share agency fees that would assist with the

expenses of collective bargaining. Findings from the interviews divided the socialization into three categories. Initial contact with new teachers began at new-teacher orientation. All ten unions participated in school district new-teacher orientations. Some unions sponsored meet-and-greet chats, while others provided informational luncheon sessions to discuss union membership benefits. Membership incentives varied from cash to school supplies to an interest-free loan through ISTA. The primary purpose of these meetings was to give potential members a sense of the benefits and protections of the local union.

Other strategies included personal interaction with union leadership and members beyond new teacher orientation. Several presidents indicated that having the time to talk to potential and new members individually was a preferred method but not always practical in the hectic beginning of school. Union leadership scheduled social events during the first weeks of school or visited sites to meet members one-on-one. Building representatives made it a practice to welcome new teachers and support both school and union questions. Two union leaders acknowledged that these contacts were not enough; they wanted new members, but they also wanted new active members. Pogodzinski (2012) suggested that future opportunities to engage young members must happen through repeated positive union interactions with younger members.

Florida Collective Bargaining History

The nation's first example of the movement to the right-to-work state and collective bargaining occurred in Florida (McGuire, 1973). McGuire provided a detailed background of the legislative history of collective bargaining after the establishment of Florida as a right-to-work state. The author provided a three-part analysis within five years of the 1968 revision of the Florida Constitution. The first part examined the collective bargaining history in the state

through three time periods. The first era was described as the Pre-1968 Constitutional Revision and reviewed the historical absence of collective bargaining legislation for public employees under the 1885 Florida Constitution and Statutes.

The 1940s and 1950s were known for the struggle of public employees to join unions and be recognized by the employer. According to McGuire (1973), Florida legislators passed laws during the 1943 session, allowing the rights of employees to organize, but neither included nor excluded public employees. The first challenge to this law occurred in 1946 in the Florida Supreme Court case, *Miami Water Works Local 654 v. City of Miami*. The union petitioned the court that the City of Miami must accept their union to bargain collectively. The court ruled against the union, declaring that the current statutes in 1946 only applied to private industry and business, and that the right of collective bargaining did not belong to the union. The court's decision reflected the government attitude as anti-union.

A 1959 statute eventually defined limits for membership and prohibited strikes by any government employee. The challenge to the 1959 statute came in the court case, *Pinellas County Classroom Teachers Association v. Board of Public Instruction (1968).* The Florida Supreme Court ruled that the Florida Constitution guaranteed the right to bargain, yet backed a lower court ruling that prevented strikes by public education workers. The Post-1968 Constitutional Revision era provided a new and revised Constitution that expressly stipulated collective bargaining rights in the state under Article I, Section 6. The first case that challenged the new constitution was *Dade County v. Ryan* (1968). The resulting ruling by the Florida Supreme Court stated that public employees were allowed to collectively bargain but were not allowed to strike.

The third era was labeled as Post-1968 Legislative Developments and discussed collective bargaining challenges under a new administration that was anti-collective bargaining. Two governors used executive orders to forbid state agencies from negotiating or bargaining with employees, requiring state agencies to report any organizing efforts. The results of these executive orders caused law enforcement and teacher unions to challenge the orders in state court cases. These unions petitioned for a state agency to oversee collective bargaining for public employees since there was not any definitive language that defined how public unions would be regulated in Florida. The second part of the review examined H.R. 3314, also known as the Public Employees Relations Act (PERA), to establish the Public Employees Relations Committee (PERC) to manage collective bargaining reasonably within the state and stipulate what constituted a recognized bargaining unit (McGuire, 1973). The new agency, borrowing heavily from the National Labor Relations Act and the National Labor Relations Board, regulated all aspects of the Public Employees Relations Act, determining collective bargaining rules, impasse procedures, unfair labor practices, dues deductions, and penalties for striking. This section detailed the responsibilities of the agency and all its inner machinations.

The final part of McGuire's (1973) analysis detailed the projected problems that could arise under the new agency. One problem was the impact on legislators who sought to challenge union growth and circumvented state law. Another challenge suggested that there was a correlation between collective bargaining and higher wages that may impact wages and bankrupt the state treasury. The final issue presented was the concern that collective bargaining for public employees would dominate the public service sector. Concerns arose that unions may use exploitation tactics, and lobbyists may try to control political power in the legislature. McGuire concluded the piece by stating that the balance of power does rest with the employer, and that it

is in the best interests to conduct collective bargaining straightforwardly, with a gentle reminder that public employees, as citizens, could impact public organizations through voting power.

Waldby (1977) provided a brief historical overview of the history of collective bargaining within Florida. The author recounted the tug-of-war between the legislature's reluctance to enforce and regulate collective bargaining and the agency's establishment by the Florida Supreme Court. PERC members were appointed by the state governor and approved by the Florida Senate for a four-year term. The author explained the requirements for elections for union recognition and PERC certification. In the first two years of existence, PERC heard 555 labor cases that involved disagreements between unions and public employers. The vast number of cases forced legislation to define "good faith" bargaining and strike prohibitions because of three strikes from 1975-1977. Waldby included statistics that showed approximately one-third of public employees were union members, and that the largest groups were public education teachers with over 95% membership. The author concluded that the agency maintained an objective process in overseeing collective bargaining within the state.

McHugh (1978) provided a definitive narrative that discussed the importance of the establishment of a commission by the Florida Supreme Court after two consecutive legislative sessions failed to provide collective bargaining guidelines and the resulting law passed in 1974, the Public Employees Relations Act of 1974 (F.L. §§ 447.201-609). The definition of bargaining unit recognition was unclear even with these guidelines and a commission was established to oversee the process. Under PERC guidelines for recognition, "a party may petition for certification [and] this petition must be accompanied by dated, signed statements by at least thirty percent of the employees in the proposed unit" (McHugh, 1978, p. 286). Discussion about the validity of signatures and proof of membership density filled the courts until the Florida

Supreme Court ruled employers had the right to review cards if there was a question of invalidity, and that the courts "are available to enforce constitutional rights" (McHugh, 1978, pp. 287 - 288). This contribution became a valuable handbook for navigating the new guidelines for collective bargaining in Florida.

Recent legislative sessions in Florida introduced bills impacting collective bargaining. State Representative Plakon filed a bill changing recertification requirements for employment organizations on February 22, 2017. The proposed amendment to Subsection 447.305 of the Florida Statues added the requirement of an annual report of the number of employees eligible for representation, the number of dues-paying members, and the number of employees not paying dues. Employee organizations that failed to file the report would lose certification status. Another stipulation of the bill required that any organization with less than 50% dues-paying membership must re-petition for certification; the organization would have one month to re-petition and meet the stated requirements.

The bill specifically excluded organizations of public safety personnel, such as law enforcement, correctional officers, and firefighters previously defined in the Florida Statutes. House Bill 11 (2017) was referred by the House to the Oversight, Transparency, and Administration Subcommittee and added to the agenda, where the first reading occurred March 7, 2017. The subcommittee passed the bill with a 10-3 vote. The bill then moved to the Government Accountability Committee on March 1, 2017, added to the agenda on March 22, 2017, and passed 14-8. House Bill 11 was read a second time in the Florida House on March 29, 2017, and the final time on March 30, 2017. House Bill 11 (2017) passed 75-41 and was sent to the Florida Senate on April 4, 2017. The companion bill, Senate Bill 1292, was filed by Senator

Baxley on February 28, 2017, and referred to the Commerce and Tourism Committee on March 14, 2017. The bill was introduced later but postponed and withdrawn from consideration.

CS/House Bill 7055 (2018) was part of an education bill that re-introduced the collective bargaining clause requiring education unions or associations to meet a required density. Representatives Diaz and Bileca introduced the bill on January 25, 2018, in the House, and a companion bill was filed in the Senate. Numerous amendments occurred, and one amendment regarding collective bargaining simply labeled in the bill as "amending §. 1012.2315, F.S; requiring certain employee organizations to include specified information in a specified application and to petition for recertification for specified purposes;" was inserted on February 16, 2018, by Senator Thurston (2018). The amendment worded the requirement that an employee organization that has been certified as the bargaining agent for instructional personnel. stating that an employee organization whose dues-paying membership was less than 50% must petition the Public Employees Relations Commission for recertification and include a financial statement with the eligible number of personnel and the actual number of members.

The engrossed bill underwent joint resolution in both parts of the legislature. Legislators in both houses voted and passed the bill on March 5, 2018. The governor signed the bill into law on March 11, 2018, changing teacher union density requirements effective July 1, 2018. CS/House Bill 7055 was the only bill filed during the 2018 legislative session that impacted collective bargaining representation rights for any union or employee association in Florida. Since the passage of CS/House Bill 7055, state legislators have attempted to pass similar bills. Recent bills attempted to raise the density for education support personnel unions and have tried to pass a bill that required union members to rejoin every year.

Population Ecology and Resource Dependency Theories

Two different organizational theories explained how organizations reacted to and within the environment. The theory of population ecology focused on how the environment changes the organization in response to opportunities or threats (Hannan & Freeman, 1977). The basis of population ecology was similar to the Darwin theory of evolution, where organisms, or in this case, organizations, must adapt to the environment around them. The key factors of population ecology are population, density dependence, age dependence, size dependence, founding conditions, resource partitioning, and legitimacy. Hannan and Freeman argued that organizations may have been unable to handle environmental change due to competition of resource availability, organizational size, and age.

Organizations were less likely to survive if they were younger and smaller. Hannan and Freeman (1977) stated that, at the founding of an organization, the organization's initial growth allowed stability, but as the organization aged, competition for resources overcame the potential growth. Hannan and Freeman (1988) tested this theory in their study of 150 years of labor unions. Their empirical study of labor unions determined that the labor union's longevity was directly related to the number of unions present in the United States. The authors concluded that the density of labor unions increased initially and continued to decrease continuously, even with controlled environmental variables. The theory of population ecology potentially impacted teacher unions in the state of Florida due to statutory requirements. Political legislation was one external effect but was not the only contributing factor to a labor union losing density.

Pfeffer and Salancik (2003) developed the organizational theory of resource dependency, illustrating how organizations behaved for long-term viability. Resource dependency theory (RDT) suggested that organizations may have done better with altering their environments due to

external forces but were also impacted by internal decisions. One indicator of control was the acquisition of power. The actors that controlled the resources manipulated the power and influence of the organization. Internal decisions included choosing executive boards, staff members, processes within the organization, and leadership decision-making. According to Pfeffer and Salancik (2003), resource dependence theory was more dynamic than population ecology.

Organizations responded to internal decisions and internal dynamics resulting from those decisions. The resource dependency theory suggested that organizations engaged in actions that promoted support for changes within the environment and established legitimacy for change (Pfeffer & Salancik, 2003). Pfeffer and Salancik (2003) concluded that an organization was vulnerable in influencing diminished control of resources. An outside organization can take control over activities; in that instance, the organization must manage its interdependence by exerting control internally to regain control of resources. Once the organization gained internal control, it increased its dominance over the external entity.

Two separate studies examined how specific organizations applied the resource dependence theory. Van Witteloostuijn, Boin, Kofman, Kuilman, and Kuipers (2018) provided a study base on organizational adaptation tied to resource dependency. This study was a 142-organization quantitative analysis of independent federal agencies identified from the United States Government Manual from 1935-2011 (Van Witteloostuijn et al., 2018). The dependent variable was agency termination and defined by the date listed in the manual. The independent variables were the number of organizations, and the number of organizations squared, to capture density dependence. Controlled variables included the birth of agency, sunset clauses, weak legislation, size, and carrying capacity. Additional controls included sudden disruptions such as

war, federal funding, and change of mission. The authors conducted an event-history analysis to determine if agencies terminated within one year. Findings showed that agency termination was inconsistent over time and that the central independent variable, agency density, showed extreme variations. Approximately 47 to 75 agencies exited during the studied time period. Running the first three different models could not predict the specific features that made an organization vulnerable, so a fourth model, the non-founding president variable, was added. This last variable referenced the potential mortality of an organization when there was a change in political leadership who perceived organizations and their programming as non-essential. The models showed that density dependence was critical to the organization's mortality. A lower density of organizations provided more resources with less competition; conversely, the higher the density, the less likely organizations survived due to competition for resources. The authors concluded that smaller or younger organizations had less chance of longevity, and that organizational adaptation lessened survival chances especially if new leadership was present. This study added to the body of Resource Dependency Theory, because the authors suggested that organizational adaptation did not increase the chances of organizational survival (Van Witteloostuijn et al., 2018).

Cordery, Sim, and Baskerville (2018) performed a study on third sector organizations that included Resource Dependency Theory. The researchers in this study conducted a binary logistic regression analysis using financial data analysis and survey data from third sector organizations that determined if the organizations were financially vulnerable (Cordery et al., 2018). The New Zealand Football Federation provided contacts for 422 clubs; 110 clubs answered the initial survey. Ninety-eight clubs received a second survey regarding club financial status; 12 clubs

disqualified because of their club age. Forty-six clubs responded to the second survey and provided the requested financial statements.

The first part of the study focused on the internal resources from members and alternative funding source that impacted viability. The second aspect of their study indicated that internal factors (revenue from various sources) and external factors (grant funding, board/organization leadership) impacted organizations. The third aspect of their study concentrated on the perceived member benefits of an organization versus its cost. The researchers concluded that both club theory and resource dependency theory predicted club mortality more accurately than the single models alone. The author believed that further studies were appropriate for measuring membership status at levels that kept the clubs viable. Cordery et al. (2018) suggested that resource dependency was a contributing factor to the survival of the organization. Comparatively, the study mirrored many of the same factors the teacher unions faced in the state of Florida: revenue from members, political leadership, union leadership, and internal decision-making.

In a study by Walker and McCarthy (2010), the researchers conducted a logistic regression on community-based organizations and hoped to predict organizational survival, incorporating both population ecology and resource dependency theories. The purpose of their study was to determine which of the theories impacted organizational survival. The authors determined that organizational survival consisted of five elements: organizational structure, local legitimacy, extra-local legitimacy, strategic differentiation, and resources. The organizational structure element defined the membership, leadership, and resource procurement. Local legitimacy defined the organization's ties to the local community and engagement with local officials. Extra-local legitimacy defined the organizational ties to parent organizations or

institutions that assisted with capacity-building resources. Strategic differentiation referred to the focus of the organization and the services provided to its members. Resources were defined as capital from both the community and organization; organizational resources included funding, personnel, leadership, and time. Community resources were defined as the source of potential members in the local area (Walker & McCarthy, 2010). The authors referenced both the Hannan and Freeman theory of population ecology and the resource dependency theory of Pfeffer and Salancik were essential components for organizational mortality, and impacted longevity of the organization.

Conclusion

The literature review provided a background of factors that potentially led to the passage of CS/House Bill 7055 and how unions responded to that legislation. A historical timeline of collective bargaining legislation at state and national level was presented to understand the movement of collective bargaining in the United States. A review of the requirements for the traditional process of union de-authorization/decertification, and the number of states implementing right-to-work legislation was explained. This review discussed the reasons for union growth, union decline, and various organizing strategies used previously by unions. Overall, collective bargaining, recognition, and decertification of unions brought the necessary awareness to the factors that contributed to the implementation of CS/House Bill 7055 in Florida's state.

Examining organizational survival theory literature defined population ecology, and resource dependency theories as theoretical lenses for this dissertation. Both theories defined factors that contributed to an organization’s existence or failure. The resource dependency theory was one lens that examined the internal and external power struggle over resources. The

Florida Legislature, as the outside organization, impacted unions externally by requiring a mandated 50% density for teacher unions. Internally, the organizations reacted to the mandate and sought ways to cultivate membership. The union leaders realized the necessity of harnessing all resources to maintain and increase membership for the union to remain a viable organization. As a result, teacher unions and their leaders realized that the internal and external factors impacted the organization's stability. Population ecology theory stated that organizations went through their processes of determining survival or mortality dependent on how the organization experienced changes. The teacher union leaders discovered adaptation was necessary in order to survive this legislation and future harmful legislation.

III. METHODOLOGY

The purpose of this qualitative case study was to explore how public education unions maintained and increased their membership density to meet the requirements of Florida House Bill 7055. CS/House Bill 7055 was the legislative act passed in 2018 that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent. Union leaders were interviewed to discover how the new law affected their unions.

The purpose of a case study method was to obtain in-depth views of events or issues as they occurred in real-time and real-life experiences (Crowe et al., 2011). According to Creswell (2013), case studies were common in qualitative research to gather individual perspectives of the participants. The case study method was appropriate for this research to identify the strategies used by union leaders in response to the legislative mandate known as CS/House Bill 7055.

Research Design

This study used a qualitative case study design. According to Smith (2015), the purpose of a qualitative inquiry was to understand participants' views and describe personal experiences. Creswell (2013) discussed the steps in a qualitative study. After selecting the topic and performing a literature review, researchers collect data in four forms: interviews, observations, documents, and audiovisual materials. After collecting the data, researchers must verify the data with participants. Data analysis, identification, and definition of themes follow verification. Researchers then check themes against the study and report the results.

Researchers may choose from the following types: ethnography, grounded theory, phenomenological, narrative, or case study (Creswell, 2013). The narrative study was not appropriate for this study, because participant stories were not collected. The ethnography design was inappropriate, because the focus did not center on experiences within the context of a specific culture or group. The grounded theory did not fit this type of study, because a general explanation for experiences by participants would not be the result. The phenomenological theory was not suitable for this study, because participants did not experience a singular event or phenomenon. The case study method explored real-life experiences over time, and the collective case study captured multiple subjects' experiences on the same issue (Creswell, 2013). In this research, a multisite, collective case study was determined to be the best fit to answer the research questions.

Research Participants

The Southeastern University's Institutional Review Board (IRB) approved the study in November 2019. After approval from the Southeastern University Institutional Research Board, purposeful sampling identified research participants. The researcher chose a variety of cases to

demonstrate different perspectives in a method called purposeful maximal sampling (Creswell, 2013). According to Patton (2002), this type of sampling allowed the identification of individuals who were knowledgeable about the topic of interest. This type of sampling was best, because it allowed referrals through professional networking and union contacts.

Various methods were used for participant selection for the study. The Florida United Facebook page, a social media platform for union members in the state, approved a post for interested union leaders to contact the researcher. The Florida Education Association (FEA) website listed presidents and unions' directors. Union leaders received a letter of inquiry about the proposed study. Union members and staff provided recommendations of potential participants who received the email invitation. Finally, union presidents recommended other union presidents for participation in the study during their monthly FEA governance meeting. Upon expressing interest, union leaders received a copy of the informed consent document (Appendix C) and the information sheet (Appendix A) by email. Six leaders participated in the study to provide individual and cross-case themes. Each participant held a leadership role in a public education union in Florida. The age of the participants ranged from 35 to 64 years. Participants included two men and four women. The participants' demographics included total years of union membership, total years in union leadership roles, and gender. Union membership involvement ranged from 8 to 30 years, and leadership position experience varied from 6 to 20 years. Past and current roles in the union included member, building/site representative, executive board member, executive director, and president. Table 1 displayed the demographics of the participants chosen for the study.

Table 1.

Demographic Characteristics of Union Leaders

Participant	Years of Membership	Current Role	Years of Leadership	Gender
A	24	Executive Director	6	Male
B	18	President	12	Female
C	20	President	11	Female
D	8	President	5	Female
E	30	Vice-president	18	Female
F	17	President	6	Male

The researcher conducted the interviews with the selected participants; five in-person interviews occurred at two union offices, a university library, and a hotel conference room during the FEA monthly presidents' meeting. The sixth interview was conducted by phone. Each participant and organization were labeled with a pseudonym. Two participants held different leadership roles in the same union. Table 1 presented the leadership roles, years of union membership, years held in leadership roles, and gender of participants**.**

Role of the Researcher

This researcher had over 15 years of education union membership; 12 of these years occurred in the state of Florida. This membership included three levels of union participation: the local education association, regional affiliation with partner AFL-CIO, and national union affiliation with the NEA and the AFT. Additionally, her experiences included serving the local union as a building site representative, committee member, and elected union officer; these roles provided union leadership training and participation as an education lobbyist for the local and state teacher unions. Having a union background provided a greater understanding of union machinations, organizing, and Florida education unions. This intimate knowledge of unionism required bracketing. The bracketing technique required researchers to put aside personal

theories, research presuppositions, inherent knowledge, and assumptions from observations during the research to maintain objectivity while capturing the participants' perceptions (Basksh, 2018; Creswell, 2013).

Measures for Ethical Protection

Creswell (2013) discussed how to ensure ethical issues in a qualitative research study. Maintaining ethical standards was the responsibility of the researcher. To maintain ethical standards, the researcher completed the ethical guidelines for the research course through CITI and submitted the certificate with the research protocol. The IRB of Southeastern University approved the research before any interviews occurred. No vulnerable populations were involved in this study.

Upon approval of the protocol, volunteer participants received informed consent forms and purpose statements by email. Participants who volunteered for the study signed an informed consent form that described the purpose and procedures of the study, which included measures for confidentiality and anonymity. At the interviews, participants received another explanation of the purpose of the data and provided verbal consent for recording interviews. The interviewer assured participants they would receive interview transcripts for verification of the interview, and that all information from those transcripts were available only to the student investigator, primary investigator, and methodologist.

A locked filing cabinet in an office with a locked door and a password-protected computer contained all researcher notes, transcripts, and information sheets that identified participants. Participant names and organizations received pseudonyms to ensure that there was no identifying information about the participant and organization. Permanent destruction of all

data will occur after three years. All paper documents and field notes will be shredded, and a data-eraser tool will be used to delete information stored in the cloud accounts.

Data Collection

Creswell (2013) discussed data collection as the procedure used to acquire data. Qualitative studies can use many sources of data, including direct observations, interviews, documents, archival records, participant observations, and physical artifacts. In addition to determining which sources are appropriate, researchers must include processes for determining validity and reliability. Semi-structured interviews were considered the best tool for this research.

Instruments Used for Data Collection

Prospective participants completed a brief information sheet (Appendix A) that provided information on union background and union experiences. Understanding the varied backgrounds of the participants prepared the researcher to look for similarities and differences between the participants. The information sheet gathered the following information from prospective participants before the interview:

1. Name
2. Name of education association/union
3. Location of education association/union
4. Current and past roles in public/education association/union
5. Current certification status through PERC
6. Current membership density for the public education association/union

Six union leaders participated in semi-structured interviews to gather qualitative responses to the research questions. Creswell (2013) noted that minimizing the number of cases

allowed the researcher to collect extensive detail during the interviews. Twelve interview questions (Appendix B) guided the interview process with the participants. Five interviews occurred at mutually agreed-upon locations, including two union offices, a library, and a hotel conference room. The sixth interview occurred by phone. The interview times ranged from 20 minutes to 45 minutes in length.

Validity and Reliability

All interviews were captured with an audio recording application using a cellular phone or a computer. Capturing interviews via mechanical method excluded interviewer bias and provided a permanent record that can be verified by other researchers (Breakwell, Wright, & Smith, 2012) After capturing the audio-recorded interviews, the interviewer uploaded the files into the Otter AI (2019) software transcription program. The researcher verified the transcriptions' accuracy against the audio recordings and sent the transcripts to the participants for verification and validation. According to Bailey (2008), detailed transcripts should capture features of talk, such as emphasis, speed, vocal tone, and pauses, as these are essential factors to consider in interpreting data. Upon receipt of the interviews, five participants determined that the transcriptions were valid, and one participant chose to add clarifying details on the transcript.

Data Analysis

Data analysis can occur through manual coding and computer coding. According to Garcia-Horta & Guerra-Ramos (2009), the use of computer-assisted qualitative data analysis software has both advantages and disadvantages in qualitative analysis: the advantages of the software to code, organize, store, and retrieve data did not replace the researcher’s ability to make coding decisions or elaborate on themes found within the coding. Upon receiving verification from the participants, the investigator organized and numbered the transcripts. The

researcher uploaded the numbered transcripts into the qualitative software analysis program MAXQDA (2019) and started to process data for analysis of the interviews. Difficulties with the software occurred. The researcher manually coded all transcripts.

Data analysis occurs through many methods in qualitative research: interpretative phenomenological analysis, narrative psychology, grounded theory, conversation analysis, discursive analysis, discourse analysis, cooperative inquiry, and thematic analysis (Larkin, 2015). Qualitative researchers must choose the appropriate analysis style to provide a particular perspective of the data. In this study, thematic analysis was the best type of analysis, because it aligned with the constructivist framework, allowing flexibility and theme mapping. Clarke, Braun, and Hayfield (2015) discussed the six steps in thematic analysis: familiarization, coding, searching for themes, reviewing themes, defining themes, and writing the report.

The first step, familiarization, occurred during the data transcription before verification. Transcription accuracy was vital to proceed with verification. After verifying the accuracy, the next step in organizing data was numbering each transcript for the initial reading. During the initial reading of the transcripts, the researcher made margin notes to help define coding.

Coding was the next step to assist in finding patterns. Saldaña (2013) explained the importance of coding allowed researchers to arrange data to find meaning and explanation. After completing the first cycle of reading, the researcher read the transcripts a second time and compared each participant's answers to each interview question. Transcripts were colored-coded by each question, and significant statements were placed in corresponding blocks in an Excel spreadsheet. The interviews were read a third time using anchor codes, and readings resulted in an analysis of 147 codes populated across the dataset.

Identification of data codes occurred and analyzed for themes. The categorization of codes occurred based on the research questions. Clusters were color-coded and further condensed into themes, and a thematic mapping took place. Themes relevant to the research questions were defined to summarize each theme. Clarke et al. (2015) stated that theme definitions explained the concepts, organization, and boundaries of the various code clusters identified in the data analysis. Upon identifying major themes, a fourth reading occurred to determine if themes matched the data set. Final results concluded with a total of four themes. The next chapter discusses the results of the analysis.

Summary

Case studies illustrated how participants experienced and made sense of events (Creswell, 2013). Chapter Three discussed the methodology used for this study. The definition of the research protocol followed the steps outlined for case studies. After obtaining approval from the Southeastern University IRB, the researcher identified participants through purposeful sampling. Participants received the consent forms by email and set interview appointments with the investigator. Subjects participated in interviews at mutually agreed times and places, and the interviewer obtained verbal consent and recorded the interviews using the approved protocol. Transcriptions of the interviews occurred using the Otter AI (2019) software and mobile app software, and participants verified the transcripts. Analysis of data occurred using the six steps of thematic analysis. Protective measures happened to ensure that this study was valid, reliable, and ethical.

IV. RESULTS

The purpose of this qualitative case study was to explore how public education unions maintained and increased their membership density to meet the requirements of Florida House Bill 7055. CS/House Bill 7055 was the legislative act passed in 2018 that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent. Union leaders were interviewed to discover how the new law affected their unions.

CS/ House Bill 7055 was passed by both houses of the Florida Legislature on March 5, 2018, signed by Governor Rick Scott on March 11, 2018, and enacted on July 1, 2018. The requirements of the new law were codified in Florida Statute 1012.2315(4c), which is defined below.

1. In addition to the provisions under s.447.305(2), an employee organization has been certified as the bargaining agent for a unit of instructional personnel as defined in s. 1012.01(2) must include for each such certified bargaining unit the following information in its application for renewal of registration:
    a. The number of employees in the bargaining unit who are eligible for representation by the employee organization.
    b. The number of employees who are eligible for representation by the employee organization, specifying the number of members who pay dues and the number of members who do not pay dues.
2. Notwithstanding the provisions of chapter 447 relating to collective bargaining, an employee organization whose dues-paying membership is less than 50% of the employees eligible for representation in the unit, as identified in subparagraph1., must

> petition the Public Employees Relations Commission pursuant to s.447.307(2) and (3) for recertification as the exclusive representative of all employees in the unit within one month after the date on which the organization applies for renewal of registration pursuant to s 447.305(2). The certification of an employee organization that does not comply with this paragraph is revoked.

This specific statute increased the density requirement from 30% to 50% for public education union recertification. All public education unions were required to meet the new density mandate at their next recertification date. An examination of registration orders from the Florida Public Employees Relations Commission website verified that all five unions were valid as bargaining agents for their counties in 2018 and 2019 (PERC, 2020).

Methods of Data Collection

Crowe et al. (2011) stated that the purpose of a case study was to determine the events or issues experienced by the participants, from their perspectives. The case study approach allowed the participants to share their views according to their truths. Participants completed an information sheet (Appendix A) to provide background information, and they signed a consent form before participating in the interviews. The interview schedule (Appendix B) consisted of 12 semi-structured questions.

Data analysis identified 147 open codes that occurred through manual coding. These were narrowed down to 87 code clusters and compared to the research questions. The researcher used an Excel spreadsheet to map the clusters manually, reducing the clusters to nine. Based on the characteristics of participants' responses, the nine codes resulted in four themes. A review of transcripts occurred to find relationships, and relevant statements were pulled from the data to corroborate the themes found in the research.

Table 2.

Code Clusters Created from Open Codes

Codes	Number of Interview References
Beneficial attitudes/determinants	6
Community Actions and Emotions	6
Decision Making	5
Density information	6
Financial Implications	4
Harmful attitudes/determinants	6
Legislation	6
Perception	4
Service-based Actions	3

Research Questions

Participants were asked twelve open-ended questions during the semi-structured interview. The questions were constructed in relation to the research questions to analyze the themes for this case study. The following two questions guided the study:

Research Question 1: What organizing techniques are used by public education unions to maintain or increase the required membership density?

The union leaders recognized that their unions had to evaluate the current strategies used for membership recruitment, as well as find new ways to maintain density. All six participants shared their experiences in leading public education unions before and after the CS House Bill 7055. The participants shared the current union density for their organization and stated that their organization currently met the state requirement. Each union met or exceeded the mandated requirement at the time of the interview. Table 3 provides the union density for the five public education unions at the time of each interview.

Table 3.

Union Density Figures Self-reported by Leadership

Union	**Current Union Density**
Union A	52%
Union B	68%
Union C	70%
Union D	52%
Union E	55%

How did the unions and their leaders respond to the new requirements? The leaders discussed the short- and long-term impacts of the bill and upon membership requirements. Most of the participants responded that they believed a reversal of the intent of CS House Bill 7055 occurred. Participant D claimed, "...it actually has swelled our membership across the state."

Participants C and E agreed by commenting that their unions were stronger because of the legislation. Participant F remarked that the bill brought an increase in union density, yet he expressed concern that future bills from the legislature may occur that required union members to re-authorize their union membership every single year. Participant F strongly felt that "…if that was to become law...they're--hoping that during summertime when membership is at its lowest...that they can get us to drop a little bit below 50% so they can use 7055 to decertify us." The leaders all expressed the new requirement caused an evaluation of current organizing strategies used before the bill and decided what changes had to occur to maintain and increase density.

Each of the unions had their strategies for building membership prior to the new density requirement. Participant B explained that Union B had a significant membership level over the requirement but was dismayed, because the union membership decreased slightly. She explained:

> For me.... the biggest difference is dropping below 70%...our standard is 70%. We always kept membership numbers in mind. Membership, for us, is always one of the top priorities, and you know...we are always mindful of where our numbers are.

Participant B explained that Union B used traditional methods of organizing for new members: new teacher orientations, union-sponsored lunches in the schools, and 10-minute breakfast meetings.

Membership drives at new teacher orientation were a common event. Some of the unions hosted special social events held during new teacher week at the union office in an informal setting. This event allowed potential members the opportunity to ask more questions about joining the union and meet union leadership. At worksites, current union members also maintained a role in recruiting new members by introducing themselves to new teachers, becoming the first contact, and hosting socials at the worksite. Participant C explained that her union focused firmly on building relationships and increased communication by visiting worksites. “One of the victories in this last contract...we now have it so that [union staff] meet with potential members during their student day during their planning period. We want to find out what you’re missing or how Union C can benefit you.”

A common strategy used was educating eligible employees about the value of collective bargaining the contract. All leaders agreed the union provided essential services for its members, and that the services have value. Above all, the main service was collective bargaining the contracts each year. Participant E explained that collective bargaining was not just about wages. "This is how [the union] protects your day-to-day working conditions. It's not just salaries... [collective bargaining] includes health care, lesson plans, duty plans." Participant B stressed the importance of collective bargaining with the following statement:

> You know, there are so many things that are mandatory subjects of bargaining, and if we lose our ability to bargain because our union is decertified, what would life be like? What would the working conditions, the hours and pay...what would happen to those things? If you think that someone on the other side of the table is just going to maintain or make those conditions better, I think that's a very naïve view.

Leaders emphasized collective bargaining as one of the most important services offered for members, but also the non-members of the bargaining unit. Participant B discussed the issue of the right-to-work status affecting unions, as the non-members had the "...ability to receive the benefits that are negotiated by the bargaining agent without having to be a member." Participant A stated that maintaining membership in a right-to-work was enough of a challenge without the complications of the statute.

Member services were another perk caveat that encouraged workers to join the union. The benefits of holding union membership included member representation [the member had access to a trained union member foadministrative meetings], professional development, and discounts through AFT, NEA, and FEA membership savings programs. Participant A also stated, "In our organization, we spend 110% of our time on member issues...", referring to union member representation in meetings with administration. Participant B remarked that "…our goal here in the office is…to make life better for others every single day...and to provide the highest quality of service…".

Four of the five unions offered professional development courses for their members. Participant B stated that Union B had its own professional development department, providing courses needed for recertification, such as the required ESOL and ESE endorsements or certifications. "We're paying the price to have these folks trained. Our members will be able to

take these trainings at no cost versus having to go to the community college or wait for an online course at the district." Union C offered classes for the reading endorsement, and Union E mentioned that their professional development program also provided in-service points. Union leaders participated in programs that can "train the trainer" by learning how to offer these courses and provide that training to the membership for recertification points.

As a union member in Florida, members had access to discounts for travel, purchases, homeowner insurance, car insurance, and car purchases. According to Participant F "…there is a great deal of discounts that we qualify for in insurance, travel, and so forth. We have ways of saving money. If there's someone shrewd and used the [benefits] app, they could easily get their dues money back…" Other services included retirement workshops, know your contract seminars, and meetings with union benefit partners. The financial benefits, services, discounts, and professional development were offered to potential members as benefits, increasing the value of membership.

Tangible incentives played an essential role in organizing. Union wear and paraphernalia were an essential part of recruiting. Participants D and E mentioned that having branded merchandise brought awareness of the union to employees and enhanced membership. The leadership for Union D decided to invest in membership by providing all members with a union t-shirt because, "...teachers love a tee-shirt, let me tell you…" according to Participant E. Union A and Union D leaders offered potential new members monetary incentives for joining the union during membership drives; high target times, such as new teacher orientation, offered new recruits amounts ranging from $20 to $50.

With so many benefits already offered to union members, how could unions change their organizing strategies to increase their membership once CS/House Bill 7055 took effect? Union

leaders discussed current techniques were important, but they had to add strategies that were more effective. One new approach was data-driven organizing. The focus of data-driven organizing was to examine the current numbers by site and find potential members in the buildings. One technique, known as mapping, provided a visual location of union members at a worksite. Participant C explained mapping as the following procedure of color-coding employees at a worksite as green, red, or yellow. Green represented current members, yellow represented potential members, and red represented a no. The visual mapping technique was a way to examine how individuals clustered at a worksite, and then connections made through other union members at the same location.

Another data-driven technique was wall-charts. Participant B explained how her union used this technique.

> Just like you have a data room in schools for kids… I created data walls for the professional staff so that they can always be mindful of the schools they are covering, what their numbers are, who their stewards [building representatives] are, the percentage of membership, the percentage of potential members, and where they are sitting density-wise at their schools. So, we have had these charts up there for about two months now...and in January, I am going to ask them to go back and update their own, so it becomes more meaningful to them. So, when I am thinking about membership and how to make it more meaningful to them, our professional staff members need to know their data.

Participant C explained the data system used at Union C. A spreadsheet listed non-union members, along with the school, the department, their hire date, and if they had ever been a union member. Leaders set a monthly and quarterly goal to achieve a specific density at the end

of a specified time. Each district vice-president and school representative would receive the spreadsheet, with columns for logging the number of contacts made with potential members. The leaders would log the number of contacts made with the potential member and attempt to meet the goal to increase the density. Data-driven decision-making was a numbers-based method that targeted areas for high recruitment rates.

Data-driven recruiting was one effective method. Union leaders discussed another organizing method that effectively increased membership: mobilizing union members to make personal connections with potential new members. Participant B expressed that it was part of building the union to have members connect with new members. “We believe that it is the obligation of every member, to sustain our organization, is to talk to their colleagues about membership." Using new hire information from their office, the leaders of Union C encouraged personal communication from current members to the potential member to make a connection at the worksite. The initial conversation hopefully led to other conversations to inform them of the union member benefits. Participant D discussed the importance of having that resource on campus, because the building representatives provided personal conversations:

> We heavily rely on our building reps and their relationships that they have with their staff that we may never have. Because, you know, when you work with people side-by-side every day, you know you develop those relationships and that trust. It is very important to build your building reps and train them to have the one-on-one conversations...really talking to your new folks, making sure that you have introduced yourself...first friend...best friend.

Participant E said the personal connections went beyond the worksite. “We’ve had a couple of events of just fun nights, come together with your fellow union members, but let us

just get to know each other. ...you know...almost become a comfort level within your family." Many leaders perceived that the personal connections initiated by current members were more effective than collateral picked up at orientation days or sent through the school courier system. Offering incentives for recruiting was a common strategy used among the unions. Members who brought in new members earned recruiting awards. Participant B described a "wheel of fortune" brought to representative meetings every month. Members who recruited new members spun the wheel for prizes, such as gift cards, union gear, and twenty-dollar bills. The top prize one month was a donated Fitbit, a fitness tracker device worn on the wrist. Recruiter checks were used by three out of the five unions to incentivize members; the amounts ranged from $20 to $50. According to Participant A, the money was only one reward; leadership acknowledged that public recognition of the recruiters' hard work at monthly meetings was valued. Participants D and E believed that even though the monetary amount was not significant, the incentive checks showed appreciation for members' efforts to build membership.

Increased support from outside resources assisted the unions in all aspects of organizing by providing additional revenue, training, and support personnel. The state organization, FEA, offered financial assistance through recruiting programs based on union growth. Participants A and B described the Membership 365 program that provided monetary reimbursement and was very helpful to their organizations. Participant B explained that Union B depended on both FEA and AFT to support growth. The professional development offered through the AFT Train-the-Trainer program offered increased opportunities to earn in-service points, and without that financial support from the FEA Membership 365 grant, Union B could not offer those programs. Additional training is available through the FEA Summer Academy to assist union leaders in training their members to support the union. Support personnel is a key component utilized by

the unions to assist in organizing. Participant A discussed that FEA sent professional organizers to the local unit.

> For the last three summers...people from around the state of Florida...throughout the country...came down here. They helped do a focused campaign…. they will go to schools. That [technique] has worked. So, we had some help from our state and national affiliates, they recognize the challenges we are facing.

Using the trained personnel was beneficial for the unions because the provided professional staff instructed local members in organizing strategies and actually recruited members as well.

FEA provided support staff to assist the unions in everyday union work as well. Participant C discussed how utilizing FEA support staff allowed the leadership to split the county into two sections. The support staff duties included assisting with new teacher functions, covering positions when a staff member is out on leave, or carrying out office duties to allow union leadership to make worksite visits. The resources available from outside organizations illustrated another avenue to increase organizing after the bill. Participant F summarized the value of the national organizations and their support:

> We get the help with the professional development; we get financial help when we need it. The biggest concern of the state organization is what do you need to be successful? We definitely appreciate our state organization, the American Federation of Teachers, and the National Education Association.

The union leaders discussed a multitude of other strategies according to the needs of the individual union. "You rally around issues...when we have a unifying or electrifying issue that impacts all teachers...they're willing to fight for their concerns."

One leader believed that the law spurred members to action from their passivity. Participant B felt that the bill "...really shows the importance of what unionism is all about and what solidarity can do...that folks that took their membership for granted...see the value of it...in the possibility that it could be lost." The threat of losing bargaining status served as the catalyst for change.

Participants D and E discussed the changes in how union leadership added a social media presence to communicate to members and potential members by adding a social media presence. Participant D explained that "Communication has been one of our top priorities...make sure that we're communicating not just your email, but we know we're blasting social media. We're being present through text messaging programs." Participant E claimed that Union D "has gotten more social savvy...and that people are appreciating it, because you see people more engaged...that there is live time [communication]...you don't have to wait."

Participant A discussed that organizing meant spending more money using any of the strategies and noted that Union A "...did some things that we have not done...so we decided to spend money. We spent considerable dollars this year to increase our membership." All six leaders emphasized that the members believed they received a return on investment of their dues and found value in the benefits and services offered. The bill's impact required each union and its leadership to evaluate current strategies and make improvements to raise the required density. Although there were similar strategies, every leader and every union chose strategies they believed would bring successful increase in membership.

Research Question 2: What external factors affected public education unions in maintaining or increasing the required membership density since the passing of House Bill 7055?

Union leaders faced a new challenge with the enactment of the new law. Adaptation of organizing strategies was required to meet the new density. Even as the leaders worked internally to meet the new requirements, external factors impacted the unions. Every union leader perceived various outside issues that affected organizing strategies, but not limited to one category.

The union leaders expressed frustration over the influence of an entity known as the Professional Educator's Network of Florida (PEN) that attracts educators to membership with a lower dues rate than the local. The Pen website describes PEN as, "a professional organization for teachers and support staff throughout the State of Florida. PEN offers liability protection, legal representation, professional development, and networking opportunities for educators in the Sunshine State" (Professional Educators Network of Florida, n.d, About Us section). Participant D stated:

> That is like your pseudo...they try to come in and try to be your liability insurance and say you do not need your union. They have no way to collectively bargain...and no way to protect your folks. They do not want to get involved in education politics. It is pseudo-union.

Participant F described the organization as "nefarious" and believed it was put into existence to compete with teacher unions.

> They will say they will claim to be able to support teachers with legal advice, counsel, and liability insurance. They will try to break members away from the unions and say that they will represent them, but they have no claim to our contracts. So, they cannot. They cannot negotiate contracts. We are still the sole bargaining agent. So, you are not getting the representation at the table when you join an organization like PEN. You are actually

> hurting the people that are at the bargaining table trying to get you raises, trying to get you better working conditions. I believe that once our contract disappears, I think companies like PEN would disappear as well.

Participant F also stated that even though PEN dues were about one-third of the cost of member dues were for his union, the organization's primary function was to only provide liability insurance and could not touch the value of the contract through his union.

The reference to the contract disappearing brought up the question of other external factors that influenced unions directly. All six leaders believed that the right-to-work status of the state harmed organizing. Participant A discussed the challenges of meeting the membership requirement, and she had concerns about the union staying in operating mode. "We like the fact that the union can remain open...open our doors to people...to survive in a right-to-work environment and mind that 50% threshold." Participant F believed that individuals should have the right of association without influence:

> We live in a right-to-work state, or as I call it, a right-to-work for less state...So people should have a right to join an organization if they want. If they choose not to, that is fine, but it should be their choice. Not, oh, they are less than 50%, so they do not exist anymore. Does that mean that 45% of the people do not deserve a voice?

Participant D reiterated her most pressing concern:

> I already know going in that [Florida] is a right-to-work state. I do not have to join but I see the value in collective bargaining. [Legislators] are going to put this arbitrary number, because [they] want to destroy collective bargaining.

The same leader shared a story about a recent meeting where she compared Florida to another state that eliminated collective bargaining completely. "We hold up our current contract of

several pages...and then hold up Wisconsin's when they have three pages and say 'Look'. That made a huge impact." The status of a right-to-work state, such as Florida, meant that employees were not required to join, but still benefited from the work of the recognized bargaining agent when negotiating with the local school administration.

A third factor that union leaders perceived was the influence of local administration. These union leaders felt district or worksite climate directly impacted the membership. Participant C felt that worksite administrators' views of the union affected membership. She elaborated, noting a positive administrator encouraged their staff to become members and collaborated with the union, in contrast to negative administrators who were not supportive and seemed threatened by the union. If members perceived that there were harmful working conditions or negative issues, membership increased. Participant B explained the state of the district impacted membership for Union B:

> We have also had a lot of change in a very short window. We have a new superintendent...this is an opportunity for us to build relationships. We could impact bargaining some decisions, but we are not at the point right now where members are fired up to go out and move from member to activist.

Membership loss came from the perception that activism in the union decreased promotion within the district. Participant E believed:

> If you are a member, but you are also active...you may be less likely to move up into Dean positions. I have been told that they look at that, things when making decisions on who they are going to move up, and the deans, even though we represent them, is the first step towards vice-principal.

The perception of the union as an unwelcome presence on campus by the administration increased negative impact on local organizing. Two leaders explained how an adverse climate affected membership. According to Participant E:

> We have some administrators...who are not really open to the union on campus, and their teachers pick up on that. So, some of those teachers make a selective choice; I am not going to join the union; this is my administrator, [and] they control my day-to-day life. I do not want that pressure.

Participant C also explained union access to potential members had to be negotiated through the contract to allow union leadership to make campus visits during the day. Union C's prior contract limited union meetings before or after the school day; the new contract allowed union leadership to meet with employees during their planning periods. The cultural climate of the local school district was perceived as a direct influence on membership numbers.

A fourth factor that impacted union growth was the perception of a current atmosphere that failed to support public education as a priority at the state and national levels. Participant C wished she could "...inform the public of the attack on public education. There's a whole movement to take the monies of public education and put them elsewhere...there's a lack of funding." Participant E recalled a school board meeting where the insinuation from the board was that the teachers "...knew what you're getting in to and you should basically be grateful you have a job." Participants A and D felt strongly that public education was not relevant to the general population of the Florida Legislature the past few years in terms of funding education. According to Participant D, "We had a hard bargain because Tallahassee starves us with money." Participant A believed that:

> We have a state government environment that is probably not the most friendly to public education, sad as it is. You would think that most people see public education as an actual virtue, and a great program to show our legislators. And we elect people that vote here, make investments in charter schools...and they seem to be passing laws that favor their organizations. I will also say they are not funding schools as well as they should. You put money in schools, and you put money in school districts. Our district is difficult as they try to work with us...will try to increase salaries, they can only do what they can based on the money they get.

Participant F echoed a similar sentiment about the perception that state government-initiated activities every year that seemed to attack public education and promote privatization of education with charter schools.

> There is a vested interest in charter schools. The biggest external factor is the privatization movement...to spend countless amounts of money to push an agenda to make it seem that public schools are failing. Private companies showed how determined they are to make a business out of public education. They are not a friend to unions. And laws like this one or legislation like House Bill 1...or Senate Bill 736...every year...target public education. It is something that comes on a regular basis. Those legislative mandates have harmed the profession, and teachers are running scared. There is an exodus of teachers from the profession that is going to lower the number of teachers in the union, because, if you have less teachers, you will have less members.

The union leaders fully believed that the current government failed to support public education as guaranteed in the Florida Constitution. Legislation that favored charter schools, voucher programs, and reduced funding had the potential to eliminate public schools. Without

public schools, there would be no one to collectively bargain contracts, and without collective bargaining, no use for unions and union membership.

Time, talent, and treasure were external factors and resources that impacted unions directly. With so many strategies for consideration to increase membership, leaders had to decide how to best use resources for the good of the union. What did decision-making look like? What factors influenced the leaders in making those decisions? Each leader expressed he or she made decisions influenced by their own union experiences. Participant C felt that the impact of leadership influenced decision-making. One example was the capacity of the present leadership. She explained that not all individuals took the initiative to be trained through the state and local organizations. "It was very eye-opening to think...I've been involved for 20 years so I know all this stuff, yet people have been involved longer than me [and]may not know it." Another influence was the growing pains of leadership change.

> Our executive director was an awesome president for many years...and when he became staff...I think it was a struggle for that person. It is not their vision. I think I am the first president that is really asserted this is our organization, our vision. It is like the idea of inertia. This person is used to it being this way, and [I am] challenging that. He has made our organization his identity... and I had to say...it is not really about you.

Participant C also explained how the organizational structure influenced Union C, as she discussed a typical meeting.

> So once a month, our board meets and determines a vision and the actions of the organization. So, when we have our building rep meeting, we share the actions that we took. The board can always be overruled by the building reps... they can okay the actions

or not. It has not happened lately [that representatives]..that they are not okay [with board decisions].

Time dedicated for union work impacted union leadership. Participant C discussed that the leadership was not on release status from the district. This status means that all the elected leadership was in the classroom and performed the work of the union at night. Participant C was frustrated by this hindrance; her priority for this year was to focus on membership. "I'm taking that time...I want to give time to membership, because that's where we're going to grow, and then develop that capacity for leadership."

Another factor for consideration was the amount of funding received through various sources. Funding was another concern for each of the leaders. Participant A speculated the increased expenses and felt that "...we're going to have to do some things we haven't done before. Probably will have to do this every year...this is unfortunately, the reality." Three of the leaders mentioned Membership 365 grants as a source of funding. Participant B explained that the money was a grant that the union received if the organization meets required benchmarks. The purpose of the benchmarks was to provide a standard to increase membership. Participant C delineated the process as the opportunity to develop its membership plan for the year. FEA facilitated training programs for the local leaders to collaborate on their density goals and form a plan with the leadership team. "If you meet those benchmarks...it's usually a 2% density...if you meet those benchmarks that you and FEA have agreed upon, you receive the money." Participant F agreed that FEA provided an additional layer of financial support by explaining that Union E received financial help when needed.

Managing the funding was also crucial. Participant D explained that FEA guidelines required that an expenditure of over $500 required the approval of the executive board and

limited spending without cause by union leaders. Leaders were entrusted with the membership dues that funded the organization, and leaders did not want to be viewed as spending funding wastefully. Financial stability and accountability of the union resources were an integral piece to union longevity.

Each of the union leaders also explained that the union's organizational structure was key to carrying out decisions. Each union had two components; the professional staff of hired employees and the union leadership, consisting of the elected leaders at different levels in the district. Participant A explained that Union A's model had an executive board of elected officers and at-large membership positions, a representative council of the elected worksite representatives, and the general union membership. The executive board created and suggested programs and carried the programs to the representative council for approval. Upon approval of the representative council, the programs were released to the general membership. The staff side of Union A consisted of three business representatives, the executive director, and three support positions. Participant A stated that his role and the three business representatives supported the membership with representation matters and collective bargaining. Participant B similarly described her union model; there was an executive board of officers, regional vice-presidents appointed to a geographic area, and the building representatives in those areas plus the professional staff.

> I have conversations with the professional staff and the executive board. I can tell you though that the lion's share of the work comes from the professional staff. So, if we were to do percentages of organizing based on, comparing executive board and professional staff, professional staff would have a higher percentage.

Participant C also explained that her union used a similar model with an executive board, district vice-presidents, membership representatives, and office staff. One bonus was one vice-president who had the experience of serving in a staff position and was able to view suggestions from both lenses. The member-leader model was evident in Union B: officers, an executive board, and the representative council with committee chairs. When asked how decisions were made for organizing, Participant B attested that it was through the board. Participants D and E reported a similar format as well.

The perceptions and experiences of the union leaders provided through their interviews highlighted the similarities and differences based on size, leadership, and resources used by each individual union. The responses of union leadership provided insight into how these five unions responded to CS/House Bill 7055. Although the bill impacted all unions the same, the response varied according to each individual local union.

Themes

Upon reviewing the data and analyzing for patterns based on participant responses, four significant themes were evident regarding how unions made decisions about organizing for members before and after CS/House Bill 7055. Creswell (2013) identified themes as "units of information that consist of several codes aggregated to form a common idea" (p.186). The four themes were derived from the statements of the participants. The findings from the thematic analysis of data are presented in Table 2.

Table 2.

Themes from the Case Study

Theme	Description
1	Sustainability
2	Unity
3	Growth determinants
4	Adaptation

Theme 1: Sustainability

All participants believed that the unions must establish sustainability in present times, as well as the future. Sustainability was perceived in four areas: legitimacy as an organization, financial security, community visibility, and trustworthiness. Legitimacy as the recognized bargaining agent by the Public Employees Relations Commission (PERC) was a major factor of sustainability. The teacher unions were required to meet the new density if they were to sustain recognition as the recognized bargaining unit. Participant A feared that the day would come where the union were not recognized if the required density increased through legislative action.

> If you lose the status of being the bargaining agent, you have to go through the business of reapplying as an organization. You have to go through the entire organizing process. Signing cards, petitioning paperwork to have an election. It is certainly something that no organization wants to do.

Participant C mentioned that two unions in the state had not met the required density, but those unions were not affiliated with FEA, therefore, they did not have the access to the state organization resources and assistances.

While recognition was a key factor, Participant B believed that financial accountability and stability was necessary in sustaining a union. Membership dues were essential in funding union operations, including organizing strategies. Membership loss negatively impacted operational funding, and membership gain positively increased operational funding. Investing

funds back into membership provided opportunities to increase union density and the chances of sustaining the local bargaining unit.

Participants D and E claimed that the union presence in the local school community, whether it occurred through personal contact or social media platforms, increased its sustainability. Union visibility was perceived as a potential growth determinant, not only as an organizing tool, but solidified the union as a legitimate organization within the community. This perceived visibility increased the chances of sustainability through increased union membership. Participant D also explained that the perception of trusting the union and its leadership to work for the best interests of its members was essential to sustainability. "Our members have to see. They cannot just think of the [union] of being this abstract thing. They have to be able to see and talk to us and know where we stand." Each of the unions believed that the different measures of organizational legitimacy through PERC recognition, financial and resource responsibility, union presence, and trustworthiness affected community views of the union as a stable organization. If any of the four components were compromised, the organization experienced challenges to its survival by loss of membership. Loss of membership impacted the true sustainability of teacher unions. Without careful planning of organizing strategies, unions risked failing to meet density requirements. Without the mandated 50% requirement, the unions lost sustainability.

Theme 2: Unity

All participants believed that there must be a sense of oneness to maintain the union. Unity was developed through shared values, goals, and missions. The union leadership believed that unity occurred through building a collective society with similar attitudes and interests. Participant F mentioned that any evidence of discord negated the desired perception of solidarity. Participant B noted there had to be a strong desire to work together for the interests of the

members to achieve growth, because it is crucial "...to clarify that people don't think the union is just out for the individual." Participant F explained that unity came through "...the working together of committees within the leadership to formulate a direction that the membership would like to head in, and it depends on what it is you're trying to accomplish."

Participants D and E explained that the union presence offered the feeling of a second family or "first friend, best friend" through communication and personal connections. "We absolutely start from the moment we know of new teachers. It is fun to find those people hired into your school...and you are letting them know that you are there for them. Come to me if you have any problems...". Each leader also explained that the union's work also meant that issues were a rallying point that unified education personnel. Participant D recalled two contrasting views of unity as it occurred through state rallies for education issues.

> There was a rally in 2016, and we only pulled around 250 people. We only filled three [buses]. On January 13, [2020] there was a rally...and I think our vacancies that day were about 1600. Over 700 people in Tallahassee...and about 600 people went to a local rally. After their duty day. This happened to be the perfect storm.

Participant F felt that unity was defined best as "...just building solidarity, you know. You usually feel solidarity best when you have common goals, common vision." Unity building occurred in many forms: the services of the union, rallying together on common issues, empowering the leadership, and offering a sense of a true community.

Theme 3: Growth Determinants

All six union leaders believed there were positive and negative growth determinants to building an organization. Negative factors were the elements that decreased union membership. Participant E discussed the impact of climate in the district or at the worksite that affected

organizing efforts. Participants B and C perceived the impact of legislative acts that discriminated against specific unions, while not applying the same standards to all public service unions. Participant A argued that the factors of privatization of education and anti-union legislation were factors in dismantling public education unions. Union leaders also reported the "silent strikers" as members who resigned from the union or resigned from the profession. This departure affected union growth, in addition to attrition from retirements and terminations. Participant C feared for the future of education, as she commented that the number of students in traditional education programs decreased, reducing future potential educators and future union members. Participant D acknowledged another negative factor was getting through the barriers of change; it was a struggle for any leadership to institute change or challenge people to try new ideas.

Leaders discussed the many positive factors that were presented, encouraging union growth. Each leader lauded the commitment of union volunteers to provide the necessary time commitment to spearhead membership campaigns and attend trainings. Positive financial support from parent organizations provided funding that allowed leaders to invest in its membership through services, social functions, representation assistance, and professional development. Building a sense of camaraderie was evident through the personal contacts and communications made to potential members. Participant A said that the "...sole purpose is to spread the word to attract people to what we do and try to sign them up to become members." Participant F explained that the pride of being a union member influenced growth:

> If you want to build your membership, you need to brag about your union...you got to love your union. You got to be able to walk around and say I am really proud of the machine and celebrate every single victory. Say it loudly and let them know...hey we got

that family health insurance...you know how that happened, right? They do not realize that there is somebody that is fighting all the time to get things or to make things better.

Shared decision-making through the organizational structure encouraged growth by developing leaders within the union and empowering them with the decision-making of the union resources. The ultimate goal of increasing union density depended on how the leaders responded to the positive and negative growth determinants.

Theme 4: Adaptation

The last theme identified was adaptation. The leadership of each union realized union adaptation was necessary to remain as the legitimate bargaining agent recognized by PERC. As union leadership inventoried current resources, funding, and strategies, they concluded that adaptation was necessary, since the legislation most likely would not be repealed by the state legislature. Leaders believed adaptation was required to meet organizational needs. Participant A explained that Union A added formal training sessions to educate members on building interpersonal relationships with potential members. Union A increased the dollar amount of the financial incentives given to both the recruiting member and new member upon joining. Participant C explained that Union C leadership populated pre-made outreach contacts for building representatives as an identification tool of the new employees at a site. Participant C emphasized the importance of the team approach that any union member could recruit, an adaptation of the belief that recruiting was not just by the building representative and not just at the worksite. "You could see patterns…and maybe…this person is really good friends with them...or I go to church with them…".

Participant B explained that the largest adaptation for Union B was a twofold shift in mindset regarding the work of the union. A data-driven approach that identified the percentage

of current and potential members at every worksite was the first change. The second shift was the leadership belief that "...we believe it is the obligation of every member to sustain our organization is to talk to their colleagues about membership...about why I'm union." She wryly noted that this belief was a challenge for many members, acknowledging that "…we know that not everyone is at the same place." Her final words on the need for adaptation? "When you are faced with potentially losing something, it should raise the bar. It makes strategy more important…and we have to make informed decisions. No, we're not going to try, we're going to do it."

Influence of CS/House Bill 7055 on the Unions

The data analysis showed that every leader expressed strong concerns about the impact of the bill on unions at the local and state levels. Participants B, D, and E shared their perceptions of the bill as harmful to education unions and its members. Participant F described CS/House Bill 7055 as a "...union-busting bill...it serves no other purpose meant to bust unions." Participant E described the bill as "an easy way to immediately decertify teacher unions throughout the state," whereas Participant C deemed the bill as "...a scare tactic..." to discourage union growth. Two participants described the bill as discriminatory to members on the characteristics of the profession. Participant E believed the bill meant to "...cripple our teachers' unions specifically because they [the Florida Legislature] carved out every other public union except teachers and so it was meant to silence us." Participant B also referred to the bill as discriminatory, because it did not require the same densities for police officer unions and fire unions, commenting, "I think it's very blatantly targeting one group of individuals...and you know...in the 21st century...I thought we had moved beyond those things." Participant F referred to CS/House Bill 7055 informally by remarking, "...we call that the decert [decertification] bill." Participant B strongly perceived the

bill as discriminatory by gender when she remarked that the bill was against the teaching profession, that most teachers are predominantly female, "…and it was an attempt to discriminate against women who have decided to become a member of their union." Participant F perceived the bill as a "...malicious intent to hurt unions," and Participant E felt that the entire purpose was to "hamstring the power of our state union."

Three leaders discussed the legal aspects of the bill by referring to state documents. Participant C expressed, "...teacher unions have to have 50% in order to be the bargaining agent for their local. In decertifying local unions, you remove collective bargaining, which is against the Florida Constitution." Participant F mentioned, "It's in the Florida Constitution that you have the right to collectively bargain...I don't recall any of the legislature has the right to infringe on that. We basically have been absorbing a lot of harassment from the legislature." Participant A stated:

> The main thrust of that bill...it now requires education unions...[that] represent teachers to maintain a minimum of 50% density or membership. That is a very critical issue because obviously the law now says if you do not do that...you lose the status of becoming a bargaining agent. That is the main thrust of that bill. Clearly, it was designed to create hardships and obstacles, we believe, for instructional unions.

One challenge appeared in the recertification dates before and after the implementation of the law. Three of the unions had certified for the 2018 year before the effective date of the law and would not have to recertify until 2019. Two unions had certification dates set for the beginning of the fourth quarter of 2018. These two unions had a very short time window —less than five months-- to gain new members to meet the new density requirement.

Evidence of Quality

This topic of study was investigated using the collective case model proposed by Creswell (2013). The case study method allowed researchers to delve underneath the surface level of events impacting individuals or organizations. The initial step identified a relevant topic that impacted an organization and how the leaders experienced the organization's changes. After receiving approval of the topic of study from the IRB of Southeastern University, purposeful sampling occurred to identify potential participants.

Six participants were selected for interviews and received the consent form and purpose of the study. Interviews were conducted at mutually convenient times and locations. Recordings of the interviews were captured with both a cellular phone and a laptop. After conducting interviews with multiple participants, transcriptions of the interviews occurred using the Otter AI (2019) software program. Transcripts were sent and validated by all participants. Several coding cycles occurred after validation. Codes were clustered and thematically mapped based on similar characteristics. The characteristics were aligned with the data to determine themes. Coding cycles and themes were captured within the Excel spreadsheet to create the codebook of the study. Throughout the process, the researcher conferenced with the dissertation committee. Areas of concern were addressed and remedied.

Summary

Chapter Four presented the evidence of the lived experiences of union leaders whose unions were impacted by legislation that mandated new membership density requirements. Information gathered through the interviews conveyed the endeavors, perceptions, decisions, and action plans of the union leaders. All participants shared their visions, their desired goals, and their initiatives for the continued survival and growth of the union. Chapter Five provides the

discussion of the results of this case study, its limitations, its implications, and recommendations for future research.

V. DISCUSSION

The purpose of this qualitative case study was to explore how public education unions were maintaining or increasing their membership density to meet the requirements of Florida CS/House Bill 7055. CS/House Bill 7055 was the legislative act passed in 2018 that required public education unions to maintain a 50% membership density for recognition as the collective bargaining agent. The passage of CS/House Bill 7055 in 2018 has the potential to impact the context of collective bargaining for teachers in the State of Florida.

The first national legislative act to regulate collective bargaining was The National Labor Relations Act of 1935, also known as the Wagner Act. The act's purpose was to regulate the process that workers used to establish unions who negotiate working conditions. Congress passed the Taft-Hartley Act of 1947 in response to the clamoring of corporations and employees who argued that, although workers had the right to join unions, they also had the equal right not to join unions. The state of Florida had its struggles with public and private sector employees as well. Private-sector industries allowed union formation under the Wagner Act; however, public sector industries did not have sufficient guidelines for their unions.

As a response to public sector strikes in 1973, the Florida Supreme Court created the Public Employees Relations Commission to oversee the certification and recognition process for all public unions and validate union density requirements. The Florida Legislature passed CS/House Bill 7055 in 2018. This new law required public education unions to maintain a 50% membership density recognized as the bargaining agent for the local school district. Two research questions guided this study and focused on the external factors impacting union density

and organizing strategies developed. Discussion in this section includes interpreting the results, implications for future practice, and recommendations for future research.

Interpretation of the Findings

In this qualitative collective case study, the researcher reported the experiences of six union leaders whose unions were influenced by the legislation that mandated new membership density requirements. Findings were interpreted through the constructivist lens and the organizational survival theories of populations' ecology and resource dependency. Applying the constructivist paradigm was appropriate, because the union leaders learned to make organizing decisions as they made meaning of the bill's impact upon their unions. Evidence from the participants' responses showed that elements of both theories applied to this study. A summary of the results and their connections to the research questions was presented in Chapter Four. The interpretation of the results and the conclusions were representative of the data collected and are not meant to speculate that all teacher union leaders in the State of Florida shared the same experiences.

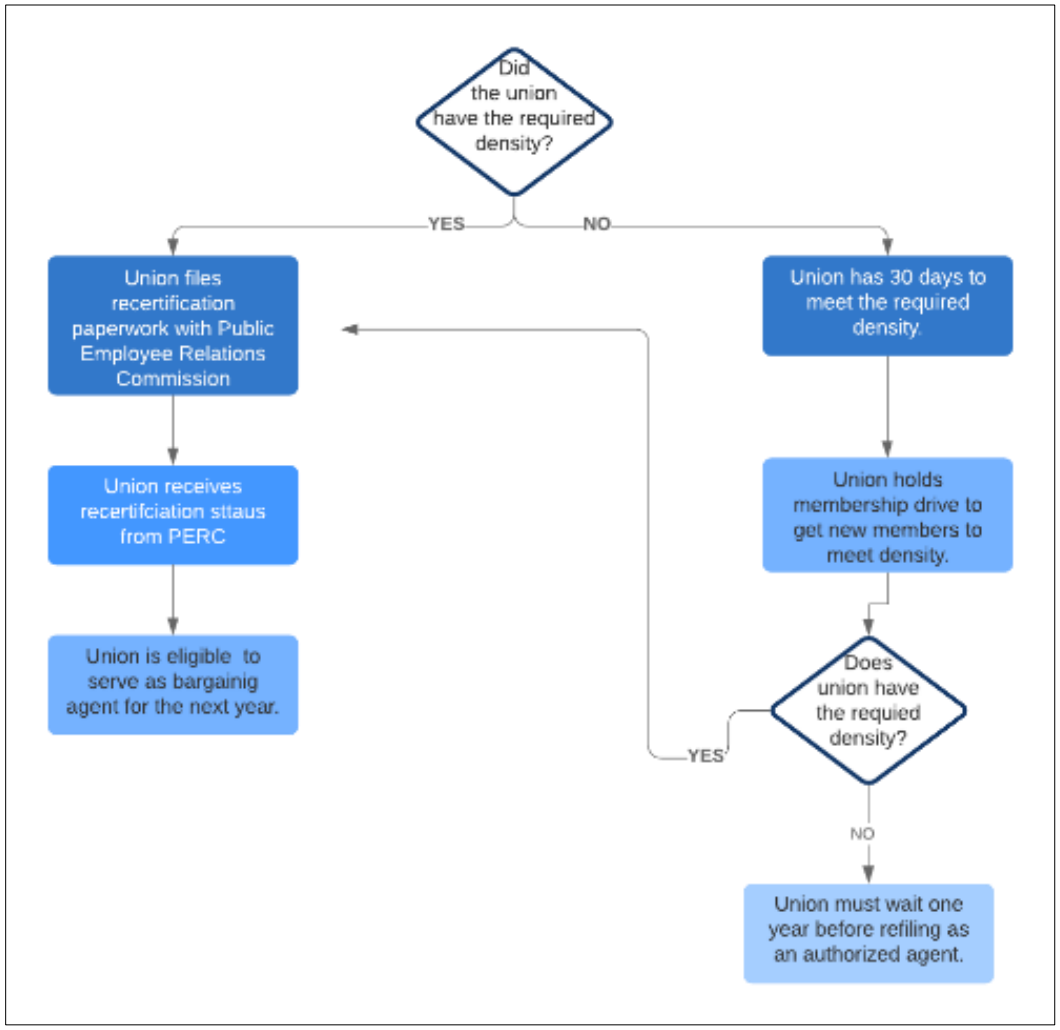
Research Question 1: What organizing techniques were used by public education to maintain or increase the required membership density?

Each of the union leaders believed that their unions experienced the impact of CS/House Bill 7055 in diverse ways. The legislative mandate raised the required density from 30% to 50% effective July 1, 2018. Timelines for individual unions were based on the individual union recertification dates; consequently, some unions were required to meet the new mandate sooner than other unions. Union leaders felt the pressure to meet the density requirement or face re-certification, a lengthy endeavor. Participant A vigorously asserted, "It's certainly something no organization wants to do."

The recertification process involved re-applying to PERC as the chosen bargaining agent for that school district. The process required that the unions gain members by promoting membership card drives and having current members re-sign membership cards to gather the required number of signatures within the 30-day time limit. Figure 1 illustrated the process of recertification if a union did not meet certification requirements.

Figure 1

Steps to Acquire Union Certification



Inertia was a second key component of population ecology: if an organization did nothing, the lack of movement resulted in organizational mortality (Hannan & Freeman, 1977).

The unalterable environment demanded that union leadership examine current strategies that worked in the past, as well as determine fresh ways to recruit new members. Similarities of the strategies employed by the six union leaders included new teacher orientations, site visits, and new member bonuses. Other unique approaches included recruiter incentives, personal contact with leaders, union-branded gear, and social events.

Two union leaders specifically commented on incorporating a data-driven approach to identify and approach members. Participant C commented that "We survey our new people and see what would be most beneficial for them." The leaders of Union D and Union C spoke to the importance of recruiting newer, younger teachers. Participant E discussed the two-fold influence of the new generation of teachers: new techniques increased the number of methods to reach potential members, and social media presence increased communication. Participant C mentioned FYRE, the Florida Young Remarkable Educators, the activist group of younger teachers. Each union incorporated different approaches according to the recruiting needs of that union, and each union leader acknowledged that the necessary changes occurred for the good of the union and its members. All of the leaders acknowledged that the union members must believe that there is a good return on investment, socially and financially, with union membership. Change became an integral part of the five unions reaching their certification goal. Participant A's statement accurately summarized how union leadership most likely felt by incorporating new changes. "We stretched." Population ecology applies to the survival of education unions in Florida - the union that adapts to a new environment survives, while the union that fails to adapt risks losing recognition as the bargaining agent for the local district.

Research Question 2: What external factors affected public education unions in maintaining or increasing the required membership density since the passing of House Bill 7055?

When reviewing the data on how to understand what external factors impacted union density, the factors spanned several categories. Competing organizations, state and local education climate, and union resources were regarded as the top three external causes. Leaders perceived that these various factors directly affected education unions, but not every union experienced the same factors equally.

Three leaders discussed the impact of a competing organization, the Florida Professional Educator Network (PEN) as an education association that offered liability insurance, networking, and cost-saving benefits to potential members, but had no leverage in collective bargaining with school districts. Participant F explained that this association targeted potential members and union members by luring people with lower dues but unable to offer the benefits of collective bargaining – a key differentiator. Participant F also speculated that, if public education unions ceased to exist, he felt that PEN would disappear.

Climate was a common thread mentioned by all the union leaders. The perception of an anti-public education climate at the state level concerned all six leaders. The leaders firmly believed that a disregard for public education existed in the state. All leaders cited issues with defunding public schools, harmful legislation, school voucher programs, and the charter school movement. One leader commented that the adverse climate spilled over into teacher training programs as the number of interns entering the teaching profession decreased, potentially impacting future union members. Local climate impacted member organizing strategies. Participant B believed that the views of local district administration was echoed among worksight principals. Union access to members during the workday often had to be negotiated to allow union leaders to meet potentials. Participant C noted that positive administrations encouraged union membership; those administrators who did not support the

union seemed threatened. Additionally, the view that union activism hindered advancement was common; individuals were reluctant to join, if they desired promotion within the district.

The factor of right-to-work status impacted organizing strategies. Under the Florida Constitution's right-to-work clause, public sector employees had the opportunity to join unions but were not required to join. This clause allowed the employees to benefit from collective bargaining while not responsible for supporting the effort by paying dues. Participant F explained that district administration viewed the lower density as an indication that the union only represented their members' best interests, instead of the entire bargaining unit. The external factors of competing organizations, state and local climate, and right-to-work status reflected the outside events mentioned in Hannan & Freeman's theory (1977). While the union cannot alter the external factors, union leadership should internally develop programs to encourage growth by utilizing all necessary resources.

The Findings Related to the Literature

The research collective case study produced four themes that identified how union leaders navigated necessary changes to meet the new union density requirements mandated by law in Florida. The identified themes were (1) sustainability, (2) unity, (3) growth, and (4) adaptation. These themes incorporated the experiences and beliefs of six union leaders and their unions' organizing strategies before and after CS/House Bill 7055. Reviewing the data provided by participant interviews, these four themes unveiled the differences each participant and associated union experienced in the challenge to keep union density. In Chapter 4, the four themes were authenticated with actual statements from the six participants. The following discussion synthesized the meanings of each theme revealed from the lived experiences of each participant.

Theme 1: Sustainability

Sustainability emerged as one of the relevant themes. Every union leader who participated in this research expressed their concerns about sustaining the union presence. In order for union growth to continue, union leaders felt they must harness the many different resources available to help them build towards their organizing plan. All six participants acknowledged that assistance came through ties with the Florida Education Association, National Education Association, and American Federation of Teachers: these parent organizations offered member unions financial assistance through membership growth grants, as well as professional development workshops to discuss organizing strategies. Additionally, NEA, FEA, and AFT also taught the union leadership how to strategize for their specific organizing needs, as every union had different views about reaching the density goal. Once each union discerned available resources, union leadership determined the types of organizing that fit best. It seemed that there were myriad ways that the leaders decided on their strategies for organizing. An approach of strategic differentiation showed that not all unions were the same and strategies were chosen for the needs of the individual union. While there were some common strategies, such as new teacher orientation, the union leaders realized that they had to develop strategies for the best interests of the union members. Participant E emphasized that the money was invested back into the membership, allowing members to see what the organization was doing for them.

Resources—whether it was time, talent, treasure—represented the components that the union must control. Gaining control over the resources reflected the core of Pfeffer and Salancik's (2003) resource dependency theory. Gaining control over the resources meant that the actors (in this instance, the union) gained power and deflected the non-controllable external environment's potential damage. Equally important was the recognition by union leaders that, with no control over the external factors, changes must occur internally within the organization.

If the organization failed internally to respond to outside pressures, the organization was more susceptible to collapsing. The ability of the union to adapt reflected Hannan and Freeman's population ecology theory (1977). Both organizational theories equally applied to the survival of education unions in the state of Florida.

Theme 2: Unity

Evidence from the interviews suggested that the six leaders felt that unity within the organization was essential to carrying out the union's purpose. Building a culture of solidarity was a crucial factor. The leaders acknowledged that maintaining a united front is one of the most challenging aspects, but necessary for union organizing. Participant A believed that the perception of helping team members and doing a decent job ultimately builds up the union. "If you want this organization to remain the bargaining unit, good or bad, who is here to represent your interests full time, you have to use those words to help bring people into membership." Decision-making was an aspect that impacted unity within the unions. The union leaders felt that without consensus, organizing strategies would not have as much of an impact on the growth. Unfortunately, consensus and unity were not always easy for the unions to maintain. Solidarity among members to do what was best for the union seemed an easy goal, but difficult to achieve, in reality. Participant E, who had the most years of union experience, explained that the process was not always easy and had seen her union struggle to reach that united front necessary for building union density needed to build the organization. She reflected on the changes seen in her union:

> We are at a better place than where we were when I first started. We were having issues internally, and there were some things that needed to be addressed, and some staff that needed to be replaced. You have to make new hires; someone retires, you have to replace them. Get in those new ideas, that willingness....so maybe that last time it did not work.

> The atmosphere is to change the environment and let us try something. You cannot just stay in the past.

Participant F, who had experience in a carpenter's union before transitioning to a teacher's union, wryly noted that, sometimes the union's biggest challenge is the organization itself. He commented:

> There is always going to be politics, factions within an organization, and it is okay to disagree with each other at rep council. Internal politics and infighting is probably one of the most detrimental things. Sometimes you have issues with staff as well...that do not believe in the cause...that can hurt you. But as far as the outside world is concerned, you should be a solid rock of solidarity. There should not be anything outwardly. Because those are not the things that are going to help the membership. Because non-members are listening.

Participant D commented on the union stakeholders' ability to work together for the common goal of building membership and reminding members of the mission. "It doesn't matter about you. What does the union do daily for members?" The work of the union supplies services and builds a community of togetherness for the membership. Participant E likened the connections forged through unity to that of a second family, the union family. Whether the idea of oneness occurred through union socials, worksite luncheons, or rallying on issues, members came together to further the union's goals. Without unity, the organization cannot maintain and increase the membership density to stay open for its members. Unity occurred through the union climate and directly affected the goals, mission, and purpose of the union.

Theme 3: Growth

Unions across the state had to grow in membership. The six leaders realized that union survival demanded an in-depth analysis of positive and negative factors affecting membership

growth. The findings from the interviews explained the factors that determined if a union increased or decreased its density, keeping in mind that each union approached membership strategies differently.

Positive determinants influenced growth. The research suggested the following factors promoted growth: resource control, outside assistance, and social exchange perception of the union work and leadership. Membership increase occurred when the unions gained internal control over resources needed for union stability and growth. Funding was a required resource. Participant C discussed that having more funding benefitted union growth. “I think money for training, money for outreach, money to pay staff. Money to pay a full-time release president. I guess that’s the biggest...money allows you to create the more polished look.” Time was another vital resource; many of the union leaders mentioned that there was never enough time to do the work of the union; most union members who performed the work of the union did so on their own time. Participant D mentioned, "...the officers...they're teachers...and they do their union duties voluntarily off the clock.” Acquiring time as a release from the district to do the union's work was a goal of four leaders. Other resources the leaders mentioned included personnel, office space, and professional development. If the union (the internal players) could acquire and control resources effectively, there was the likelihood of growth.

Each of the leaders expressed that the perception of the union’s work directly impacted their unions. Participant F described the impact of the social exchange perspective on union leadership. “The members voted for that person to be the president...they expect the president to carry out...that vision...and that work.” Participant A explained that “…we spend 110% of our time on member issues…our strategy is to let people know what we do…” Based on the evidence from the interviews, there was a reasonable inference that positive perception of unions

and union work increased membership; the inverse argument supported negative interactions and perceptions hindered union growth.

Outside assistance primarily came through three parent organizations: Florida Educations Association, National Educations Association, and American Federation of Teachers. While membership grants and temporary personnel were two of the resources supplied, many of the leaders felt that having staff helped with organizing. Participant A discussed the assistance provided to his union when professional organizers from the American Federation of Teachers and Florida Education Association targeted non-members through personal conversations and one-to-one meetings. Participant D remarked that the Florida Education staff assisted by "...helping us get in to [the] schools, because we don't have the manpower to deal with day-to-day stuff and get out to see...you know...six to ten schools. They're helping us do that." Organizing assistance mentioned here for these five unions corroborated with the study by Hurd (2004) that promoted that parent organizations' support supplied essential tools for membership growth.

Union leaders had to discover the negative factors that inhibited growth. The primary deterrents identified by leaders included: management, attrition, and political climate. The views of management or administration suggested that union membership blocked advancement beyond the classroom. This negative projection of union association often deterred young, ambitious teachers from membership, if they desired to pursue leadership, Participant E expressed the frustration of losing members at the local worksite due to the perception that union membership inhibited promotion to the administrative leadership track. At the end of each school year, school districts processed the employees out of the district due to retirements, resignations, and terminations over the summer. This purging of staff decreased the number of employees in the school district; more importantly, this reduced the number of employees in the

union. This yearly attrition seemed to be the most damaging element. Additionally, attrition through allocation numbers meant that the unions had a smaller pool of potential members. The unions compensated for the loss of membership by recruiting aggressively for new members to recapture the required density.

The perception of political legislation and climate negatively impacted growth. Florida, as a right-to-work state, played a significant role in union growth or decrease; all bargaining unit employees were not required to join the union, nor were they required to pay their "fair share" of funding of union bargaining expenses. Participant B mentioned the recently decided Supreme Court case, *Janus v American Federation of State, County, and Municipal Employees. Council 31* (2018), where the justices ruled that bargaining unit employees were no longer required to pay "fair-share" dues in any states. Participants A and F adamantly believed that an anti-public education sentiment drove legislators to pass destructive bills; this perception aligned with the union density decline study by Milkman and Luce (2017) and the study of anti-education bills and teacher unions conducted by Marianno (2015).

Growth was a critical factor to achieving the required union density; in this study, the participants shared their beliefs regarding the factors that contributed or limited growth in their unions. Negative determinants included attrition, management, and political climate of the right-to-work status of Florida. Positive factors for union growth included resource control, social exchange perceptions, and outside assistance commitment. Identifying detrimental and favorable growth determinants was critical for strategic organization changes to avoid the demise of the organization.

Theme 4: Adaptation

Adaptation emerged as the fourth theme. Defined as "…adjustment to environmental conditions: such as modification of an organism or its parts that makes it more fit for existence

under the conditions of its environment..." (Merriam-Webster, n.d.) Evidence from the interviews indicated that adaptation by unions had to occur for their organizations to survive in an anti-union climate. The leaders determined the primary elements needed to sustain the union. Once leaders identified sustainability components, membership unity was instrumental for implementation of the new organizing methods. Participant E emphasized "…as far as the outside world is concerned, you should be a rock of solidarity…because non-members listen...".

Organizing was impacted by growth determinants, positive and negative. While negative determinants were usually external factors and hard to combat, the positive determinants provided a solid foundation for organizing. Participant F contributed the following perspective. "If you want to build membership, you need to brag about your union, you gotta love your union…you got to be able to walk around and crow about every victory…".

Adaptation was not going to be an easy task. Participant E felt, "It's going to be an uphill battle and will continue to be an uphill battle in a right-to-work state like Florida." Participant D explained that there would be barriers of "…what we've always done it this way, getting past the let's try something new...and especially…we've tried this before, it didn't work…". Adaptation came at a cost. Participant A showed concern that new initiatives brought new expenses:

> Organizing…that's cost us considerable money. We are going to have to do some things that we have not done, so we decided to spend money. Things we didn't have to spend, we spent considerable dollars to raise our membership and probably will have to do that every year, to some extent…which is something we did not have to deal with three and four years ago.

Understanding the necessity of adaptation was best summed up by Participant B:

> When you are faced with potentially losing something, it should raise the bar. It makes decisions more important; it makes strategy more important. It makes prioritizing and

> focusing more critical. You know, we are going to have to make informed decisions. We cannot just say, "Oh, well, we're going to try." No, we're not going to try, we're going to do it.

The evidence from the interviews indicated that while there were many successful strategies, adaptation must be considered as the most effective strategy above all others. The strategy of adaptation recognizes that unions undergo the necessary changes after identifying sustainability factors, uniting stakeholder, and determining growth conditions. It is therefore proposed that the series of steps necessary for an organization to undergo adaptation be known as The Adaptation Component Theory (ACT). Unions must recognize ACT as their roadmap to longevity.

Limitations

This study provided analyses and interpretations based on a small sample of leaders of education unions in Florida whose unions were influenced by CS/House Bill 7055, a legislative act signed into law in 2018. Data collection and analysis were limited to the responses provided by six union leaders who participated in this case study. This case study did not reflect the experiences of other education union leaders in Florida. Furthermore, there were no other interviews with other individuals who could provide insight, such as state legislators, government officials, or state union officials. The sample size could be viewed as a limitation as the sample only captured the experiences of strategies used by five unions and does not represent the remaining 62 teacher unions or the state education association.

The participants were selected through purposeful sampling based on individuals who voluntarily completed an information sheet and were willing to be contacted for an interview at a mutually convenient time and location. The sample included four female participants and two male participants with varying leadership roles and years of union membership and union

experiences. While firsthand experiences may influence the study results, there was no evidence that this distinction creates a skew in the results.

Within the sample, the participants also had different unity densities at the time of the interview. Two unions had membership densities with significantly higher percentages above the state requirement, and three had memberships slightly above the 50% mandate. The variation in density may be attributed to the resources available to each of the unions, as well as assistance from parent organizations. Additionally, the school district's size and location may have impacted the ability to reach density. Finally, union organizing strategies were viewed as a variable due to each union's distinctive personality.

Another limitation of the study was the law itself. Being in its nascent stage, the mandate had only existed for two years. Singling out one specific category of public sector workers to meet the 50% density requirement, while other public sector categories maintained the 30% density, remained questionable. Additionally, there was little evidence of how the mandate had already affected unions and could impact teacher unions in the future.

Ensuring trustworthiness and credibility was an integral component of academic research. During this case study, the researcher served as an officer for a local public education union and participated in bracketing (Baksh, 2018; Creswell, 2013). The researcher put aside inherent knowledge and personal theories that could potentially impact interviewing. Contact with participants was limited to the interviews, verification, and follow-up questions for demographic information not previously collected. The researcher reflected on the codes and developed four themes. The researcher conferenced with the dissertation committee regarding the methodology used in this study.

Implications for Future Practice

Teacher unions in the state of Florida are at a crossroads in their quest for survival. Since the passage of CS/House Bill 7055, there have been other attempts to pass similar legislation. The 2021 Florida legislation session had the following bills introduced for consideration.

- Senate Bill 1014 (2021) would require education support personnel unions to re-certify at a 50% membership density. The bill required that local districts and administrators authorize request for union membership. PERC would investigate union re-certification numbers.
- Senate Bill 78 (2021) would require employers to confirm employees' desire to join public sector unions. Membership length was for a specified time, including dues deduction which would only occur during the specified time. This bill was written that union dues were the only deduction to require employer confirmation.

The anti-public education sentiment was noticed by union members across the state. Senate Bill 1014, and its companion bill, targeted education support personnel; the bill did not mention other public sector unions, such as law enforcement, fire fighters, and paramedics. Senate Bill 78, and its companion bill, wanted public education union dues eliminated from payroll deductions but did not address other unions or other deductions, such as uniforms, insurance, personal retirement contributions, and charitable contributions. Both bills died during the second reading on the Senate Floor on the last regular day of session.

Union leadership must jettison the organizing strategies with the least impact. Strong organizing strategies must be determined for the union to maintain the density. In order to evaluate organizing strategies, public education unions must assess current practices in membership management. Furthermore, the following actions are recommended for unions to increase their effectiveness in achieving their purpose of organizational longevity. Unions will

need to embrace a high social media profile to provide information, as people rely on portable electronic devices to receive information. Unions must engage the younger members of the Millennial and Z Generations to join unions. Current leaders must train the younger generations to move from member to activist for building the leadership capacity needed in the future. Union leaders must recognize that the issues impacting today's education staff go beyond the contract. There are three primary areas that must be considered: the role of leadership in the union, selling unionism to younger generations, and mobilizing individuals to influence legislative changes.

The role of leadership greatly influences union organizing strategies. One consideration is to examine the leadership at the local unit level. Leadership ability must be considered one of the most critical components in moving towards growth. Participant C expressed the frustration that building leadership capacity was limited in her union and knew that her organization would need to build up leadership from within the membership ranks. An essential aspect of leadership is the ability to build consensus within the organization. Each leader in the study expressed that their organization used shared leadership in making decisions, but the decisions may have occurred at different levels. Leadership development will take time and resources, but, if appropriately nurtured, will provide a sustainable group of leaders for the organization. Finally, the last aspect of leadership is preparing the organization for change. The sudden emergence of the legislation meant that the teacher unions had little time to activate change.

Leaders in unions had to consider alternative organizing strategies for new member recruitment. One strategy is targeting recent education graduates who usually fall into the Generation Z bracket. This generation usually has little familiarity with unionism, so union leaders should make it a priority to explain the "why" of union membership. Early introduction to unionism can occur by supporting established student NEA chapters at local campuses,

building a natural bridge towards membership in the local education union upon employment in a district. Another strategy is using relevant communication methods geared towards younger members. Generation Z grew up with cell phones as the primary communication device, with a highly focused usage of social media in daily activities. Unions must adapt from a traditional communication platform to one that incorporates social media tools, such as Facebook, Instagram, Twitter, emails, and messaging, to rapidly disseminate information. Leaders can specifically target activities geared towards the younger generation. Involvement of younger members to participate with organizations, such as the Florida Young Relevant Educator group, was mentioned by one of the interviewees. Providing activities that allow younger members, especially young members with families, to be part of their second family-- "union family" was mentioned. Family-friendly activities, such as picnics and family union nights, are just two examples. The programs mentioned above are just some of the possible ways to gain members by focusing on the members of the Millennial and Generation Y cohorts. "Selling unionism" to this focused population is a way to engage potential members by supplying relevant information, using creative strategies and outside-the-box thinking.

A final area of consideration that must be examined is leveraging membership to affect change at the legislative level. Union leaders expressed the fear that similar legislation to CS/House Bill 7055 may pass in future sessions, further harming the teacher unions. An effective argument is that the relationship between elected officials and public education supporters has grown tenuous in recent years. Public-sector unions can promote educating members and non-members alike on platforms that directly benefit both them and their families with the goal of electing pro-education legislators. Politicians have historically recognized the power of the pro-education voting bloc and are willing to back legislation that results in win-win scenarios.

Recommendations for Future Research

Based on these findings and foundations of previous studies, there are several considerations for future research. A second case study at a future point in time would provide a longitudinal study of the five unions' techniques. Utilizing a larger sample size would provide additional insight into other strategies not mentioned here. A quantitative study of techniques used by all public education unions in Florida would determine the most frequently used strategies. A cross-sectional study of the organizing strategies used by education unions compared to other public sector unions will identify commonalities in strategy among similar groups. A study of the generational cohorts, and their reasons for joining unions, may provide insight into the determinants of union membership.

Summary

Building union membership is a complex process that involves many components. From the moment employees file a petition for union certification to have the union recognized as the official bargaining agent, there is a responsibility to maintain the required density. Required union density depends on whether the union is public or private and is strictly regulated by the managing agency. The Florida Public Employee Relations Commission regulated union density for public sector unions in Florida, and the organization determined if requirements were met annually. Prior to 2018, a 30% membership density was required for all public sector unions. A sudden modification to density requirements occurred through one legislative bill: CS/House Bill 7055. The bill splintered public sector unions into two categories: public education and all other unions. The targeted nature of the legislation required a 50% membership density for public instructional unions to be recognized as the bargaining agent for the local school district.

Union organizing strategies were examined through the perceptions of six teacher union leaders. This study added to the existing body of research regarding union organizing strategies.

The study also introduced a new public policy area that presented how legislative devices changed policy regarding public-sector union density requirements. Testimonies gleaned from the participants asserted that organizing was more than increasing numbers. Successful union organizing required a skillful blend of leadership-driven change, control of organizational resources, union reaction to external factors, utilization of social media tools, and engagement of younger generations. Public education union leaders who integrate these components may effectively overcome barriers that lead to organizational demise, as they strive towards the goal of staying certified and resurrecting the relevance of unions in contemporary society.

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APPENDICES

Appendix A

UNION PARTICIPANT INFORMATION

The following questionnaire will be used to identify participants who have leadership roles in public education associations or unions in the state of Florida.

Name: _____

Address: _____

City, state, zip code: _____

Telephone: Cell: _____ Work: _____ Home: _____

Email: _____

Name of education association/union:

Location of education association/union:

Address: _____

City, state, zip code: _____

County:

Current and past roles in public education associations/unions:

_____

_____

_____

_____

Is your education association certified currently through PERC as the bargaining agent for your county? _____Yes _____No

What is the current membership density for your public education association/union?

_____

Appendix B

INTERVIEW QUESTIONS FOR ORGANIZING TECHNIQUES

1. Explain to me in your own words House Bill 7055.
2. What do you perceive to be the short-term effects of this law?
3. What do you perceive to be the long-term effects of this law?
4. What is the current number of instructional personnel in your bargaining unit?
5. What are the factors that affected membership density after the bill became law?
6. a. What are organizing strategies used to maintain membership after the bill became law?

   b. What are organizing strategies used to increase membership after the bill became law
7. What organizational levels of leadership were involved in determining the strategies and why were they involved?
8. What internal factors affected your organizing techniques?
9. What external factors affected your organizing techniques?
10. What assistance did your organization receive from state/national organizations?
11. How do you feel that House Bill 7055 will impact the future status of your organization?
12. What further comments do you have regarding House Bill 7055?

Appendix C

ADULT CONSENT FORM

SOUTHEASTERN UNIVERSITY

PROJECT TITLE: A Case Study of Organizing Techniques of Florida Public Education Unions After the Passage of House Bill 7055

INVESTIGATORS: Cheryl Plaster Vinson, Doctoral Student, Southeastern University; Dr. Janet Deck, Southeastern University, Committee Chair

PURPOSE: The purpose of this qualitative case study is to explore how public education unions are maintaining or increasing their membership density to meet the requirements of Florida House Bill 7055. H 7055 is the legislative act passed in 2018 that requires public education unions to maintain a 50% membership density to be recognized as the collective bargaining agent.

PROCEDURES: You will complete an initial questionnaire and participate in an interview lasting approximately 30-45 minutes. The questionnaire will ask information about the local public education association regarding its 1) your position in the local teacher's union or education association 2) current status regarding membership density in your union and 3) demographics of the local union density.

After completing the questionnaire, you will participate in an interview with the researcher, either face-to-face or through telephone/video conferencing, dependent on geographical location. This written consent form will be given to you and verbal consent will be obtained at the start of the interview. Interviews will be captured through audio-visual/video recording to document participation and field notes from the interviewer. Interviews will be transcribed using the Otter AI Transcription software program on the researcher's computer.

RISKS OF PARTICIPATION: There are no known risks associated with this project.

BENEFITS OF PARTICIPATION: If you are interested, we will send you a copy of the results of the study when it is finished.

CONFIDENTIALITY: The records of this study will be kept private. Any written results will be discussed in group findings and will not include information that is identifiable to you. Field notes, questionnaires, and interview transcripts will be kept in a locked file cabinet with a locked office. In addition, the computer used will be as well as a password protected cloud account to keep back-ups of the data. Individuals responsible for research oversight will have access to the records.

CONTACTS: You may contact any of the researchers at the following addresses and phone numbers should you desire to discuss your participation in the study and/or request information about the results of the study.

Student Investigator: Cheryl Plaster Vinson, crvinson@seu.edu 24422 Crosscut Road, Lutz, FL 33559. Phone: (850)376-7747

Principal Investigator: Dr. Janet Deck, jldeck@seu.edu, Southeastern University, 1000 Longfellow Blvd., Lakeland, FL 33801 (863) 667-5000 Main (863) 667-5737 Direct line

PARTICIPATION RIGHTS: I understand that my participation is voluntary, that there is no penalty for refusal to participate, and that I am free to withdraw my consent and participation in the project at any time without penalty.

CONSENT DOCUMENTATION:

I have been fully informed about the procedures listed here. I am aware of what I will be asked to do and of the benefits of my participation. I also understand the following statements:

I affirm that I am 18 years of age or older.

I have read and fully understand this consent form. I sign it freely and voluntarily. A copy of this form will be given to me. I hereby give permission for my participation in this study.

Participant Signature

Date

I certify that I have personally explained this document before requesting the participant to sign it.

Researcher Signature

Date

Appendix D

EMAIL INVITATION

Subject: Invitation to participate in a research project on union organizing strategies

Dear Union Leader,

My name is Cheryl Plaster Vinson and I am a Doctoral Candidate student in the Department of Education at Southeastern University. I am working on a research project under the supervision of Dr. Janet Deck.

I am writing to you today to invite you to participate in a study entitled "A Case Study of the Organizing Techniques of Florida Public Education Unions After the Passage of House Bill 7055". This study aims to discover organizing techniques used by public education unions to maintain and increase membership density.

This study involves one 30-45 minutes interview that will take place in a mutually convenient, safe location. With your consent, interviews will be audio-recorded. If unable to meet in person, an online interview can take place via online meeting format such as Skype. Interviews will be transcribed using the Otter Transcription software. Once the recording has been transcribed, the audio-recording will be destroyed.

All research data, including audio-recordings and any notes will be encrypted. Any hard copies of data (including any handwritten notes or USB keys) will be kept in a locked cabinet in an office with a locked door. Computer files will be secured with password protection. Research data will only be accessible by the researcher and the research supervisor. This will be done by keeping all responses anonymous and allowing you to request that certain responses not be included in the final project.

You will have the right to end your participation in the study at any time, for any reason, up until December 31, 2020. If you choose to withdraw, all the information you have provided will be destroyed.

The ethics protocol for this project was reviewed by the Southeastern Institutional Review Board which provided clearance to carry out the research. If you have any questions about the process, you may contact the SEU IRB at irb@seu.edu .

If you would like to participate in this research project, or have any questions, please contact me at crvinson@seu.edu or by phone at (850) 376-7747.

Sincerely,

Cheryl Plaster Vinson

Southeastern University